

USDA Foreign Agricultural Service

# GAIN Report

Global Agricultural Information Network

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## **Burma - Union of**

**Post:** Rangoon

### **Retail Foods**

**Report Categories:**

Retail Foods

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**Report Highlights:**

This report provides an overview of market opportunities and distribution channels for U.S. food and beverage products destined for the retail market in Burma (Myanmar).

## Market Fact Sheet: Myanmar

### Executive Summary

Myanmar is one of the last untapped markets with one of the highest GDP growth rates in Asia. It has a population of 53 million and 55% are under the age of 30. Myanmar GDP reached 75.7 billion U.S. dollars in 2017 and the retail market value is estimated about 15 to 20 percent of the country's GDP. Myanmar consumers are experiencing rapid growth in purchasing power parity, resulting in drastic changes in their food and beverage consumption patterns.

### Imports of Consumer-Oriented Products

In 2017 Myanmar imported consumer-oriented products worth U.S. \$ 1.5 billion, 50% of which came from Thailand, 26% came from China, 9% came from Singapore, 7% came from Malaysia and 6% came from Indonesia, followed by New Zealand, Taiwan, South Korea, and Australia, which all supplied between 1 and 2% of total consumer-oriented product imports. Imports of these products from the United States were only 0.35%. However this was 13% higher than the year before.

### Food Retail Sector

### Top Growth Products

1. Baking Ingredients 2. Fresh Fruit 3. Healthy Foods 4. Coffee 5. Wine

### Top Host Country Retailers

Major retailers that target medium to high end consumers include City Mart, Marketplace by City Mart, Ocean, Orange, Capital Hyper Market and Super Market, Sein Gay Har Super Market, and Gandarmar Wholesale.

### GDP/Population

Population (*millions*): 53.37

GDP in 2017 (*billions*): USD 75.7

GDP per capita (*USD*): USD 1,438.8

GDP Growth Rate: 6.8%

The Asia Development Bank reports that Myanmar's economy grew 6.8% in 2017, and forecasts economic growth between 6.8 to 7.2 percent in 2018-2019. Real annual sales growth between 2013 and 2015 was 4.3%.

### Food Processing Industry

The number of food production firms also grew from 39,000 to 42,000 in 2017. Myanmar's agriculture-based food industry constitutes over 70% of production by volume and employs the largest number of workers in the country. Recent liberalization allows foreign companies to manufacture food in Myanmar if they enter a joint venture with Myanmar companies. Domestic production of beverages including spirits, beer, and soft drinks is growing fast after the infusion of foreign direct investment. The food processing sector consists mainly of bakery products, instant noodles, coffee, tea, and ready-to-eat traditional foods.

## I. Market Summary

Myanmar, a lower-middle income economy with an estimated GNI per capita of \$1,455 in 2017, is one of the fastest growing economies in Asia. The GDP growth rate for 2016/2017 was 6.4 percent and is expected to remain the same in 2017/18, growing to 6.7 percent in 2018/19 and 7 percent in 2019/2020, mainly driven by services, industry and agriculture. Growth may be hampered by challenges including the incomplete peace process which faces multiple ethnic armed organizations fighting with the government, and the crisis in Rakhine State. In order to see continued growth, the country must also address challenges in key areas such as the investment climate, banking sector, and electrical and transportation infrastructure.

The retail sector in Yangon, Myanmar's economic center, posted a robust 95 percent occupancy rate in 2017. The Asian Development Bank predicts this sector will grow 7.5 percent in fiscal year 2017, which ended on March 31. The Yangon retail market started adopting modern retail formats such as supermarkets and hypermarkets in 2014, and retail stocks in Yangon grew by 28 percent annually after that, in reaction to the growing economy and changing demographics. Rapid economic growth, increasing purchasing power and urbanization, and the expansion of the internet and digital communication use in Myanmar have all resulted in the exposure of Myanmar's growing middle-class to international brands. A young and urban middle-class with increasing incomes and a preference for international brands is emerging. Consumer spending has the potential to increase to over \$100 billion per year by 2030, which is triple the current \$35 billion.

Retail sales in the packaged food market in Myanmar were estimated at nearly US\$1.7 billion in 2016. That represents a growth rate of over 92% since 2012. The forecast for growth in this market is also promising. By the year 2021, retail sales of packaged food are expected to reach over US\$3.1 billion, a growth rate of 60.4%. Overall, there is a rising tide of consumerism among urban populations in Yangon and Mandalay, stemming from a combination of increasing incomes and increased access to foreign brands ever since the country began to open up in 2012.

Newly announced reforms have opened Myanmar's rapidly expanding retail and wholesale sectors to overseas investment. The Ministry of Commerce (MOC) issued amended regulations (Notification 25 in 2018) creating a pathway for 100% foreign-owned retailers and wholesalers to distribute many different types of domestically produced and imported commodities. The regulations stipulate that fully owned foreign firms are required to make an initial investment of US \$3 million for a retail operation and US \$5 million for a wholesale operation. For joint ventures, where a local partner has at least 20% equity, the initial investment necessary for retail and wholesale activities are US \$700,000 and US \$2 million, respectively. These provisions do not apply to locally owned retailers or distributors, which don't require a minimum investment amount to operate. Mini-markets, convenience stores, and retail outlets with a floor space of less than 929 m<sup>2</sup> are off-limits to foreign investors. Colliers International Myanmar stated that the 2018 Notification 25 marks a welcome step in the liberalization of the sector, following

other recent developments designed to attract foreign capital into the country. Myanmar is highly promising market with significant growth potential in the food retail sector.

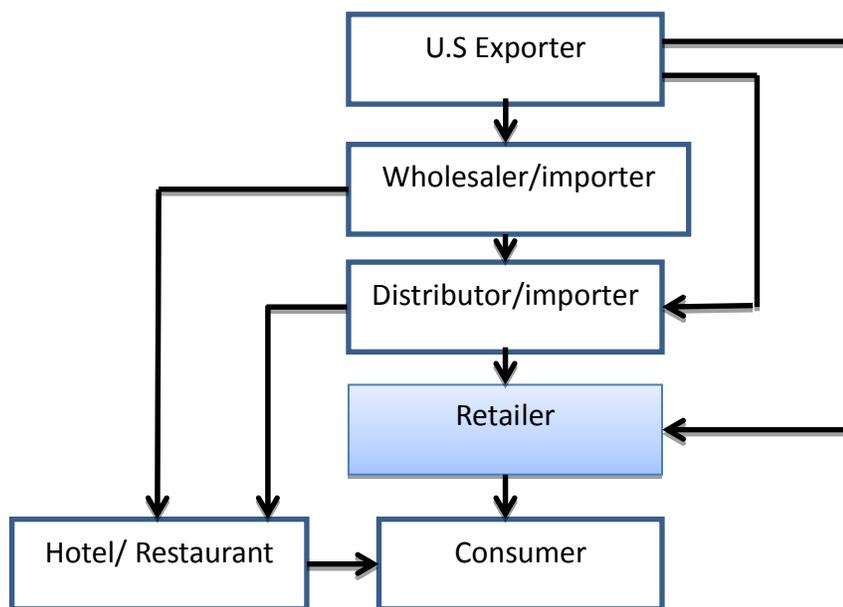
### Advantages and Challenges Facing U.S. Products in Myanmar

Advantages	Challenges
A dynamic and eager younger population under the age of 30 is willing try new products and is receptive to trends that fit their increasingly westernized lifestyles.	Stiff competition from neighboring Asian countries such as China, Japan, Singapore, South Korea, and Thailand that have logistical advantages and that entered the market before the United States.
Large untapped market of more than 51.4 million people and a rapidly increasing middle class.	Local consumption habits continue to favor local products, due to availability, price, and familiarity.
The lifting of sanctions by the United States and other countries allows for greater economic development and foreign investments in Myanmar.	Free trade agreements with Australia, New Zealand, China and ASEAN countries make U.S. products less competitive, especially for high-value consumer products.
The expansion of Retail Markets offers new inroads for consumer-oriented products.	Regional tourists sometimes seek cheaper local food alternatives and food products sourced from their respective countries.
Growth in the number of convenience stores and franchises provide new opportunities for distribution of U.S. food.	Low awareness and limited knowledge of U.S. products and major brands among Myanmar customers.
Customers increasingly seek out the convenience of retails markets, which offer more products than the wet markets and are open after work hours (unlike wet markets which are only open in the mornings)	Traditional small scale shops and wet markets are still taking a 90% of the market share outside of Yangon city.
There are very limited domestic large retail operations, especially outside of the major cities.	Infrastructural and financial challenges due to development related issues.

### I. Road Map for Market Entry

To penetrate the retail food sector, it is often best for U.S. exporters to partner with importers, wholesalers, and distributors that are willing to introduce products to major retailers. Major retailers like City Mart and Capital have their own import division that can source large volumes of products; however they source most of the food products they carry such as snacks and beverages from wholesalers/local manufacturers and distributors like Premium Distribution, Grand Twin Brothers, Nestlé, Unilever, DKSH, etc. The modern retail markets and food service establishments will remain the ideal entry points for U.S. exporters.

### Distribution Channels and Map for Market Entry



Many imported food and beverage (F&B) products come into Myanmar overland from neighboring countries, particularly China, India, and Thailand or by sea through the Yangon Port. There are a growing number of direct air links for perishable items, however, they are costly to use. Foods are often imported into Myanmar via Singapore, Malaysia and Thailand, which likely results in sales to Myanmar being underreported in official statistics. Around 60% of imports come via Yangon Port and 40% arrive across the Thailand and China borders. Imported products, including food items, find their way to the market both through legal and illegal means. There are several large-scale harbors, deep sea ports, and waterways being constructed or planned, such as a new bulk terminal at Thilawa port next to Yangon, which is scheduled for completion in April 2019. Other planned ports are Dawei Port in Southern Myanmar and Kyaukphyu Port in the west coast of Myanmar, which are being developed by India and China. These will be part of the Special Economic Zones, which offer many benefits including tax and customs duty exemptions.

The previously mentioned notification allowing foreign retail and wholesale businesses is expected to attract more foreign investments in Myanmar. A German based Metro Group, a wholesale & Food

Company is expected to operate a wholesale distribution business located in Yangon's Thilawa Special Economic Zone by the end of 2018. From this platform over 3,300 foods and non-food products and customized services will be available. They will target hotels, restaurants, catering firms, independent small retailers, and offices.

To capitalize on the growing opportunities in Myanmar, U.S. exporters should consider marketing strategies such as pricing alternatives, shelf-life training, influencing consumer preferences and familiarization with Myanmar’s food imports rules and regulations. Local consumers, especially older ones, tend to have strong brand loyalty and it takes a substantial amount of time and marketing to influence them to switch from established brands, which translates into first-mover advantages. Local consumption habits continue to favor local products, though this is largely due to availability, and price. As the market is opening up, however, many Myanmar consumers are looking for new tastes and new styles of food. The mind set of young people and high income consumers, who love to try new things and favor quality products especially from foreign countries, is different than their older counterparts. However, most of them are still price sensitive. For this reason, many importers are not willing to purchase large quantity order of new products at first. Therefore, it is important to attract consumers at the start of a products launch, so that they retailers will feel confident making larger orders with time. The way to do this is by convincing consumers that you are offering high quality products at a good value. Sometimes discounts and promotions can help to do this.

Promotional activities, point of sales (POS), and product sampling events are useful tools for promoting food and beverage products in the Myanmar market. In addition, advertising through social media, especially Facebook, newspapers, radio, television, celebrity endorsements, and bloggers is recommended. An effective way of advertising is through Facebook, using food pages, food bloggers and recommendations from customers. Furthermore, food and beverage exporters are encouraged to attend or participate in international food showcases to meet with importers, create network and to learn more about new food trends. The most popular food related trade shows are the Myanmar Food and Hotel show and the MyanFood show. Trade shows in neighboring countries such as Singapore and Thailand can also attract many Myanmar buyers.

Event logo	Event Name	Date	Location
	MM Food and Hotel	5-7 June, 2019	Yangon Convention Center
	MyanFood	Nov, 2019	MEP at Mindama, Yangon

**II. Market Structure**

Traditional trade, consisting of wholesale traders selling to small retail shops, forms the backbone of the Myanmar consumer products market. This method of distribution still dominates, with a 90% market

share in Myanmar. Modern trade through large supermarkets is about 10%, but growing. The market share and is expected to rise to 25% by 2020. World Benchmark shows that the retail market in Myanmar, excluding cigarettes and alcohol, represent 15% of the GDP. There are over 300,000 retail stores in Myanmar according to the Myanmar Retailer Association.

### **Traditional Trade**

Traditional retail stores come in many shapes and sizes in every corner of the city, and include dry foods' stores, non-food outlets and beauty stores. This segment has been same for quite a few decades in Myanmar. The Bogyoke Aung San Market, also known as Scott Market, also fits into this category. It is a large sprawling are market area, which sells many items such as local arts and crafts, gemstones and jewelry, fabric, fruit, leather, lacquer ware, cosmetics, and clothes. People still buy items in small retail stores, which are far smaller and much less sophisticated than the newer, high-tech modern stores. Myanmar People value relationships, and so once they get used to buying at one store and knowing the owner or sales staff, they tend to like to return to that store. This applies to both small and larger shops.

**Wet Market:** Wet markets, in the form of outdoor market with little to no permanent structures, are still the most widespread retail point for many food products in Myanmar, especially fresh meat, chicken, fish, fruits, vegetables, flowers, spices, and certain grocery items. This is especially true in more rural areas that lack modern stores. There is usually at least one wet market in every city and every township. However, wet markets are open for a limited period. Usually they open in the very early morning, and sometimes have evening hours, but close in the middle of the day to avoid direct sunlight. This is primarily to keep the items fresher, because most wet markets have limited electricity (if any) and no refrigeration to keep the items fresh for the whole day. Ninety percent of households still depend on their nearest wet market for a majority of their fresh food. However, for working adults, only 60% shop there because of the limited wet market hours, time constraints in their schedules, and hygiene concerns.

Myanmar is large agricultural producer and exporter. Agriculture contributes to 37.8 percent of gross domestic product (GDP), accounts for 25 to 30 percent of total export earnings, and employs 70 percent of the labor force. Most domestic products are sold in wet markets. Seasonally imported fruits brought in through border areas are also sold in wet markets. Many of the vendors at small township wet markets get their products at large regional wholesale wet markets. Popular wholesales wet markets in Yangon are the Thiri Mingalar Market and the Danyingone Wholesale Market. The latter is a new and modern wholesales market built in January 2018 on 85-acres of Yangon City Government-owned land. An investment of 118 billion Myanmar Kyat, it is expected to have a cooling system and attract a full capacity of stores by 2019. There are plans to build similar wholesale markets in Nay Pyi Taw, Mandalay and Muse, according to the Ministry of Commerce.

### **Modern Retail Stores**

Modern stores are growing, and occupy 10 percent of the total retail market in the country. They typically offer a nicer shopping experience than traditional smaller markets, with air-conditioning, organized aisles, large floor space, computerized checkout counters, and often competitive prices. The modern distribution sector includes hypermarkets, supermarkets and convenience stores owned by local business operators. According to the Myanmar Retailers Association, the number of modern retail outlets increased to 700 in 2015, which is more than a two-fold increase from 2014.

Convenience stores and supermarkets have been rapidly expanding in the larger Myanmar cities in recent years. As consumer behaviors and purchasing power continue to change, retailers are optimistic that the sector is set to experience constant growth. The initial growth of supermarkets is mainly attributed to a growing local middle-income consumer segment and business expatriates in Myanmar. However, Myanmar's retail sector is a long way away from neighboring countries. Thailand for instance, has about 15,000 convenience stores across the country, many of them foreign brands, while Myanmar has about 1000 convenience stores and all are Myanmar companies.

#### **Major Shopping Malls in Yangon (as of September 2018)**

<b>No.</b>	<b>Shopping Centers/Malls in Yangon</b>	<b>Grocery Store Inside</b>	<b>Year opened</b>
1.	Junction city	Marketplace	2017
2.	Sule Square	Marketplace	2017
3.	City Mall St. john	Ocean	2017
4.	Myanmar Plaza	Marketplace	2015
5.	Hledan Centre Neighborhood Mall	City Mart	2015
6.	Parksons	none	2013
7.	Taw Win Center	Orange	2013

8.	Junction Square	City Mart	2012
9.	Gandamar Wholesale	Gandamar	2012
10.	United Living Mall	United Living	2012
11.	Dagon Center I	City Mart	2004
12.	Dagon Center II	City Mart	2012
13.	Ruby Mart	Ruby Mart	2010
14.	Junction Mawtin	City Mart	2010
15.	Junction Zawana	City Mart	2007
16.	Capital Hypermarket/ supermarket (6 stores)	Capital	2008 – 2014
17.	Gamone Pwint (5 stores)	Gamone	2008 -2016
18.	Junction 8	City Mart	2000
19.	Sein Gay Har Super Center (7 stores)	Sein Gay Har	1985 - 2013
20.	Victoria Shopping Mall (2 stores)	Victoria	1995 - 2010
21.	Super One (7 stores)	Super One	1993 - 2015

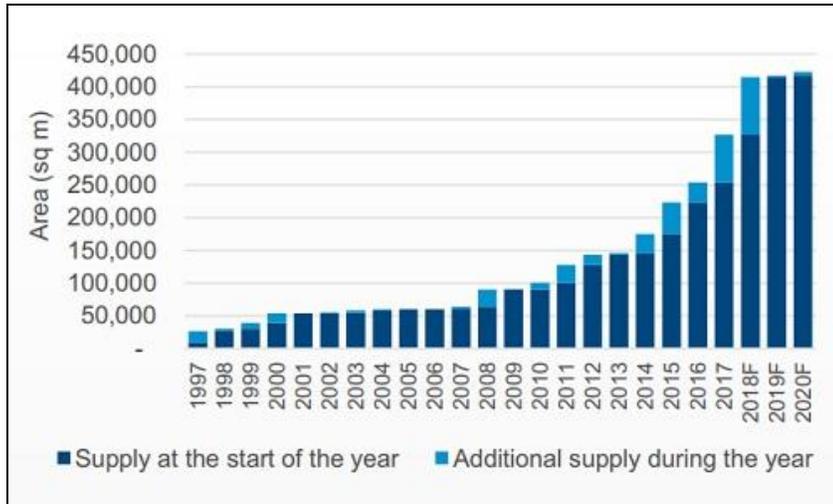
A wide range of imported food and beverages are available in these retail stores. However, local brands of alcohol beverages, instant coffee, and cookie assortments dominate the shelf space in these product categories. U.S. grocery products such as snacks, breakfast cereals, jams, condiments, processed meat and fresh fruits are available in Myanmar’s retail food markets. Myanmar allows the import of meat products and wine from the U.S. Other alcohol beverages are not permitted to be imported legally into Myanmar. Most products are imported indirectly in mixed containers from Malaysia, Thailand, and Singapore. However, some products come directly from Malaysia, Thailand, Korea, Japan, Australia, Italy, UK and the United States.

### **Yangon Retail Space Trend**

Demand for modern shopping centers is expected to remain robust, including lifestyle-oriented centers offering unique attractions. As per the Collier property report for Q1 2018, Yangon’s total retail stock grew by 16,000 m<sup>2</sup> (172,223 ft<sup>2</sup>) of leasable area, a 5% increase over the same quarter the previous year. Citywide mall occupancy drifted downwards to 93% in the first quarter of 2018 after the overall supply increased rapidly. However, the number is likely to rebound and remain at healthy levels, at least in the medium term. Colliers expects rental rates to gradually increase in the next two to three years.

This rise in supply reflects the completion of four new developments. Two are at Golden City Retail and Min Ye Kyaw Swar Tower, located in the Inner City Zone, and the other two are at shopping malls (Super One and Ocean Super Centre), situated in the Outer City Zone. In addition, several new projects will be completed in the next year, including Space by Crown Roofing Co., Golden Link by Htike Sin Co., The One Shopping Mall by Creation Myanmar Groups, and Secretariat Retail by the Anawmar Art Group.

### Yangon Retail Supply Stock (Gross Leasable Area)



Source: Collier Property Report, Yangon Retail Q1 2018

### III. Key Players and Outlets

The modern retail food stores in Myanmar are dominated by a few local players which operate all type of outlets in the forms of large, medium, and small outlets with sometimes different names. Most are located in large cities like Yangon, Nay Pyi Taw, Mandalay, Mawlamyine, Taunggyi, Bago, etc. Consumer behavior changes include an increased use of convenience stores and the purchase of packaged products like bread, instant noodles, bottle beverages, and dry foods.

Retailers are also exploring the internet for their business operations. Online grocery shopping is gradually becoming a trend in Myanmar. Marketplace by City Mart has introduced a web-based online shop for grocery and fresh items, including a delivery service. The logistical and payment infrastructure has been improving drastically in the past several years, with new options such as delivery services, mobile banking services, mobile money services, etc.

#### Key Outlets in Myanmar

Sr. No.	Company Name	High-end Grocery Store	Grocery Store	Hyper/supermarket Wholesale	Wholesale/Distribution	Convenience Store
1.	City Mart Holding <a href="http://cmhl.com.mm">cmhl.com.mm</a>	Marketplace by City Mart	City Mart	Ocean Super Center	Premium Distribution <a href="http://premiumgroup.com.mm">premiumgroup.com.mm</a>	City Express
		5	26	13	1	70
2.	Capital Diamond Star			Capital		Grab & Go

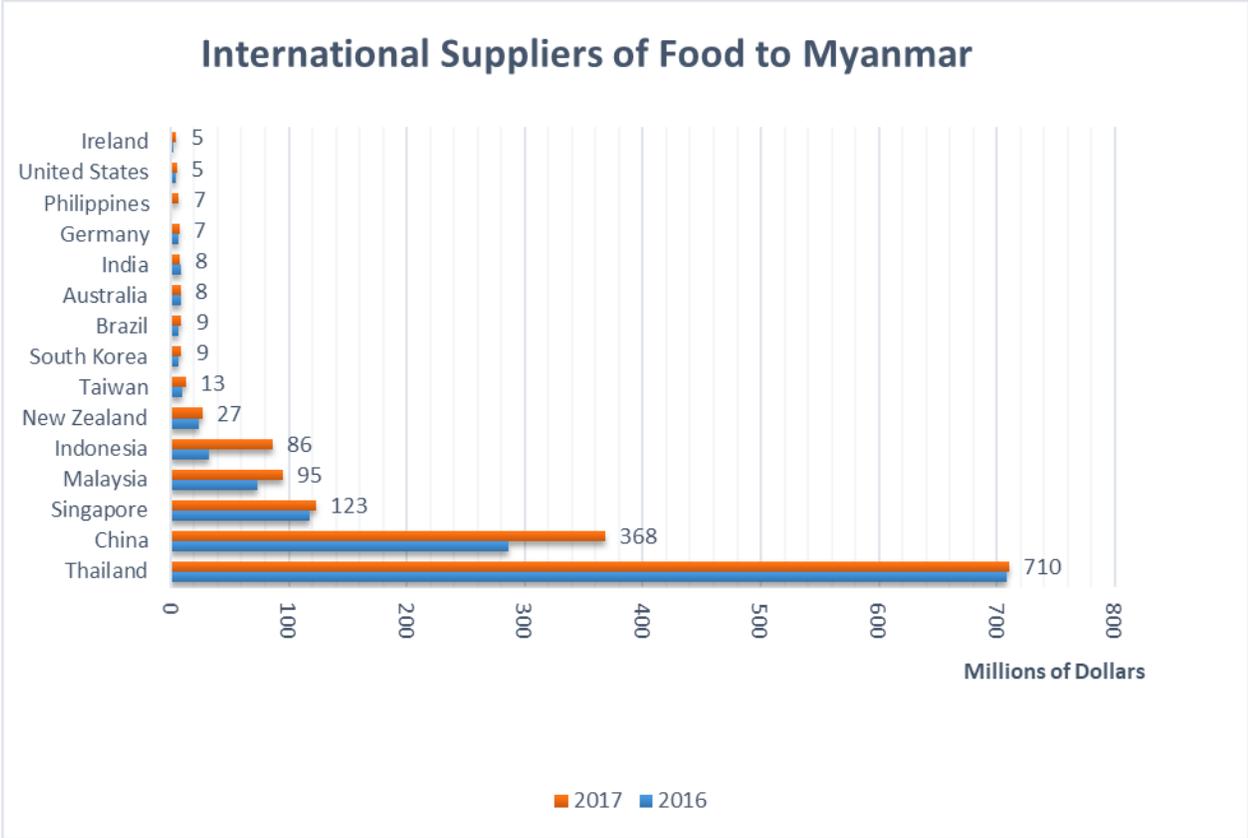
	<a href="http://cdsg.com.mm">cdsg.com.mm</a>			6		100
3.	Shwe Gandarma Group				Gandamar Wholesale 1	Ruby Mart 2
4.	Sein Gay Har <a href="http://seingayhar.com">seingayhar.com</a>			Sein Gay Har 5		
5.	Super One <a href="http://superone.com.mm">superone.com.mm</a>			Super One 7		Nation Mart 14
6.	AEON Orange <a href="http://aeonorange.com">aeonorange.com</a>		Orange 15			
7.	Gamone Pwint <a href="http://gmp-myanmar.com">gmp-myanmar.com</a>			Gamone Pwint 5		
8.	Myanmar Indo Best <a href="http://myanmarindobest.com">myanmarindobest.com</a>					ABC 100
9.	One Stop Mart					One Stop Mart 100
10.	Grand Wynn Enterprise <a href="http://gwe-myanmar.com">gwe-myanmar.com</a>		Grand Food Mart		<a href="http://GrandTwinBrothersCo.Ltd">Grand Twin Brothers Co.,Ltd.</a>	
			2		1	

At retail stores especially grocery stores and convenience stores, 40 to 65 percent of products are in the food category (not including cigarette and alcohol). The total number of sales transaction per store average 30,000 to 100,000 per day. Most of the retailers listed above have plans to expand the number of stores, which are expected to double by 2020. Traditional stores are also converting into convenience stores through franchising, so this sector is growing more quickly. Some retailers are seeking international partners in order to expand in the future.

#### IV. Competition

The increase in the number of retail stores is bringing more competition. Retail stores compete on the number of different products they can offer, and of course price. The role of imported products is becoming important, to help stores distinguish themselves by offering customers new and/or high-quality products. From the importer point of view, it is more cost effective to import products from neighboring countries and the countries which have free trade agreements. Although U.S. products have a good reputation for high quality, import taxes, marketing limitations, and transportation costs

discourage some importers from focusing on U.S. products. But as the both competition and demand grows, especially in Yangon, high-end retailers are increasingly interested in imported products to help them stand out. U.S. products entered the markets later than other countries, such as Thailand and Australia, which has given some other countries an advantage. It may take some time and effort for U.S. products to catch up.



**Consumer-Oriented Agricultural Imports, by Exporting Country (2017)**

Millions of Dollars

Sr. No.	Countries	2015	2016	2017	% Change 2017/2016
1.	Thailand	727.48	708.02	710.05	0.29
2.	China	242.61	286.5	367.96	28.43
3.	Singapore	124.5	117.74	123.08	4.54

4.	Malaysia	68.81	73.7	94.67	28.45
5.	Indonesia	19.08	32.87	86.07	161.86
6.	New Zealand	17.11	23.58	26.76	13.45
7.	Taiwan	5.16	9.41	12.68	34.73
8.	South Korea	5.83	7.09	8.93	25.91
9.	Brazil	10.32	6.3	8.6	36.38
10.	Australia	11.37	8.84	8.29	(6.30)
11.	India	9.76	8.19	7.66	(6.53)
12.	Germany	4.94	6.63	7.21	8.72
13.	Philippines	1.78	1.11	6.79	513.72
<b>14.</b>	<b>United States</b>	<b>2.85</b>	<b>4.58</b>	<b>5.2</b>	<b>13.50</b>
15.	Ireland	.	2.25	4.93	119.10

Source: Global Trade Atlas

### Origin of Imported Food Products, by Category

Millions of Dollars

Sr. No.	Products	2016 USD	2017 USD	Change %	2018 Jan-Aug USD	Major Competition
1.	(3) Fish, Crustaceans & Aquatic Invertebrates	204.45	249.62	18%	140.8	Thailand (50%), Malaysia (16%), U.S (14%)
2.	(4) Dairy Prods; Birds Eggs; Honey; Ed Animal Preparation Nesoi	1.74	2.08	16%	2.47	Singapore (18%), U.S. (19%), Thailand (56%)

3.	(7) Vegetables & Certain Roots & Tubers	101 2.04	680 .07	-49%	89.26	Singapore (78%), Malaysia (4%)
4.	(8) Edible Fruit & Nuts; Citrus Fruit Or Melon Peel	48.3 7	50. 95	5%	21.9	China (52%), Thailand (26%), Malaysia (6%)
5.	(9) Coffee, Tea, Mate & Spices	25.4 7	16. 58	-54%	6.54	India (45%), Thailand (26%), Malaysia (6%)
6.	(10) Cereals	2.72	4.5 7	41%	1.5	China (59%), Indonesia (20%), Germany (12%)
7.	(15) Animal Or Vegetable Fats, Oils Etc. & Waxes	.7	.02	- 4341 %	.15	Thailand (66%), Ireland (46%), Singapore (30%)
8.	(16) Edible Preparations Of Meat, Fish, Crustaceans Etc	2.92	4.3 9	33%	3.12	Australia (59%), U.S (16%), Malaysia (15%)
9.	(19) Prep Cereal, Flour, Starch Or Milk; Bakers Wares	.47	.5	7%	.18	Malaysia (40%), China (16%), U.S. (14%)
10.	(20) Prep Vegetables, Fruit, Nuts Or Other Plant Parts	27.9 7	21. 05	-33%	12.78	South Korea (93%), China, Malaysia (2%)
11.	(21) Miscellaneous Edible Preparations	.96	1.2	20%	1.77	Thailand (43%), U.S (16%), Malaysia (13%)
12.	(22) Beverages, Spirits And Vinegar	.96	1.4 4	33%	.7	Thailand (40%), China (44%), Singapore (6%)

Source: Global Trade Atlas

## Section IV. Best Market Prospects

### Top Consumer-Oriented Products Imported from the World

The top consumer-oriented products imported by Myanmar include fresh fruits, savory snacks, baked goods, dairy products, seafood, and processed meat.

### Top Consumer-Oriented Products Imported from the United States

The top consumer-oriented products imported from the United States include fresh fruits (cherries, grapes, and berries), dairy products (cheese, UHT milk, yogurt, and whipped cream), frozen and

processed vegetables (beef, pork, turkey, processed meat) pie fillings, dried fruits, nuts, canned fruit, pickles, seafood (scallops), cookies, biscuits, fruit juice, jams, condiments, sauces, and wine.

### **Products Not Present Because They Face Significant Barriers**

Significant barriers include a ban on the import of distilled spirits, and quantitative import permit restrictions on chicken.

### **Products Present in the Market Which Have Good Sales Potential**

Products with good sales potential include fresh fruits (apples, cherries, grapes, and berries), nuts (almonds, walnuts, hazelnuts, and pistachios), dried fruits, breakfast cereal, processed meat products, frozen seafood (salmon, lobster, Alaskan King crab, scallops), snacks and cookies, fruit juice, jams, frozen vegetables, beef, pork, turkey, pie fillings, pickles, canned foods, chocolate, dairy products (cheese, cheese spread, cream cheese, butter, whipped cream, cheese sticks, cheese dip, ice-cream, condensed milk, yogurt, and milk), wine, organic food, diet foods, bakery ingredients (wheat flour, bread improver, dough blend), sugar substitute, and ground coffee.

### **Food and Beverage Trends**

Ready-to-eat meals, healthy and natural foods and snacks, frozen meals, wine, beer, dairy products, fresh/frozen/processed fish and seafood, and halal foods.

## **V. Key Contacts and Further Information**

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End of Report.

**Appendix:**

**Myanmar Imports of U.S. Products**

Sr. No.	Product	2016	2017	Jan - Jul 2017	Jan - Jul 2018	Period/Period % Change (Value)
		Value	Value	Value	Value	
1.	Prepared Food	549	1,149	621	757	22
2.	Fresh Fruit	1,121	1,049	501	479	-5
3.	Dairy Products	1,423	1,003	597	1,786	199
4.	Sugar, Sweeteners, Bev. Bases	43	528	524	21	-96

5.	Processed Vegetables	279	495	232	351	52
6.	Eggs & Products	188	342	232	0	0
7.	Snack Foods NESOI	108	244	115	69	-40
8.	Beef & Beef Products	186	158	50	78	56
9.	Processed Fruit	172	158	69	43	-38
10.	Wine & Beer	288	141	69	160	133
11.	Tree Nuts	42	99	99	0	0
12.	Condiments & Sauces	40	95	23	65	177
13.	Fish Products	318	88	0	31	0
14.	Vegetable Oils (ex. soybean)	14	78	34	10	-72
15.	Fresh Vegetables	41	67	16	30	81
16.	Chocolate & Cocoa Products	12	60	51	57	12
17.	Other Consumer Oriented	0	50	0	32	0
18.	Fruit & Vegetable Juices	6	45	16	13	-21
19.	Breakfast Cereals	46	35	11	44	296
20.	Poultry Meat & Prods. (ex. eggs)	44	24	0	0	0
21.	Pork & Pork Products	32	24	9	280	2,920
22.	Non-Alcoholic Bev. (ex. juices)	0	16	12	1,677	14,050
23.	Rice	0	3	0	126	0
24.	Pulses	1,580	0	0	0	0
25.	Soybean Oil	0	0	0	0	0
26.	Meat Products NESOI	0	0	0	15	0
27.	Dog & Cat Food	0	0	0	100	0
28.	Distilled Spirits	0	0	0	0	0
		<b>82,843</b>	<b>71,026</b>	<b>33,270</b>	<b>80,360</b>	<b>142</b>

Source: Bico Report, FAS