

ASEAN Economy through Trade, Investment and Production Network: Myanmar's Perspective



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Overall of Myanmar's Investment and Trade Information



Yearly Approved Foreign Investment by Sector

US \$ in Million

Sr No	Sector	Foreign Capital to be brought in	1988-89 to 2003-2004	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-2017 (end of 31/7/2016)
1	Agriculture	249.866	34.351	6.000	0.700	281.222	12.000	855.996	2.500	138.750	19.897	9.650	20.269	39.666	7.180	
2	Livestock & Fisheries Mining	535.090	312.358	3.520		438.480	5.000	(-) 0.232	33.230		32.254	5.6	96.016	26.861	8.250	
3	Manufacturing	2897.606	528.190		6030.000		18.720			1396.077	4343.978	15.334	32.730	6.259	28.923	
4	Power	6765.125	1608.084	142.550	34.975			114.000	278.600	66.321	247.697	400.716	1826.980	1502.013	1064.998	
5	Oil and Gas	19684.642	0.000				170.000			8218.520		364.201	46.511	40.110	360.100	74.005 *
6	Construction	22410.368	2457.473							10179.297	0.634			3220.306	4817.790	7
7	Transport & Communication	37.767	37.767	3.500				15.000	15.250			309.200	300.000			
8	Hotel and Tourism	5175.867	313.272	2.713									1190.232	1679.304	1930.996	
9	Real Estate	2446.365	1031.061										435.210	357.949	288.395	179.420 * 90.530
10	Industrial Estate	3006.451	1053.740										440.573	780.745	728.680	3
11	Other Services	203.113	193.113									14.766			10.000	
12		687.804	23.686										18.534	357.320	235.963	
	Total	64100.064	7593.095	158.283	6065.675	719.702	205.720	984.764	329.580	19998.965	4644.460	1419.467	4107.055	8010.533	9481.275	13
																37.535 *

Source: Directorate of Investment and Company Administration- Myanmar (as of 22.8.2016)

Yearly Approved Foreign Investment by Country US \$ in Million

	Country	Foreign Capital to be brought in	1988-89 to 2003-2004	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-2013	2013-2014	2014-2015	2015-2016	2016-2017 (end of 31/7/2016)
1	Australia	129.509	82.080	126.550	0.700	281.222	(-) 1.370	855.996	2.500	8269.229	4345.728	1	17.696	43.873	29.733	
2	Austria	72.500	72.500				2.500					2.102		153.924		
3	Bangladesh	5.313	2.957									231.773		511.415	2.356	
4	Brunei	77.615	2.040				137.000						2.273	26.483		
5	Darussalam	197.084	39.781											1.277		1.948 *
6	Canada China	18112.755	66.971						6.000	5798.277			56.160	67.250	3323.853	
7	Cyprus	5.250	5.250			47.500	1.370				73.000			3.600		40.657
8	Denmark	13.370	13.370									84.839		625.556		5
9	France	541.610	470.370									11.500	5.360	208.886		
10	Germany	22.253	15.000	2.713				3.758	(-) 12.000	7.140	4.318					
11	Hong Kong	7355.659	504.218										107.102		224.665	1.153 *
12	India	732.649	4.500						237.600	76.750	51.864	54.063	26.040	85.740	224.223	5.000 *
13	Indonesia	254.687	241.497		30.575										13.190	
14	Israel	2.400	2.400				12.000				26.000	4.324		6.724		
15	Japan	672.727	208.921										55.711	9.009	219.793	
16	Macau	4.400	4.400					(-) 3.990		2676.399	25.572			0.506	257.221	1
17	Malaysia	1911.338	660.747				38.000	94.000					616.108	299.586		
18	Mauritius	39.584				81.000				226.170						1
19	Panama	55.101	29.101						39.230			37.942		4297.185		
20	Philippines	147.173	146.667				16.220									
21	R.O.K.	3491.828	195.504		6034.400			15.000				418.233	81.205	1.250	128.091	
22	Russia Federation	94.000							15.250	2146.000				27.000		2.520 **
23	Singapore	13286.354	1419.613									2300.121		165.679	4246.875	1
24	Sri Lanka	2.250	1.000						41.000		99.831	1.3		302.405		219.927
25	Switzerland	32.077	3.382			272.980				799.000		10.301		1.692	1.695	3
26	Thailand	10561.643	1312.203					20.000			18.147		529.072	850.759	236.174	
27	The Netherlands	989.566	238.835									232.700		2.041	438.025	
28	U.A.E	47.192		29.020									4.500	175.400		
29	U.K	4076.198	1587.974									329.390	156.864	64.601	75.310	1
30	U.S.A	248.216	243.565										40.150		2.610	
31	Viet Nam	693.262	3.649										142.000		4.676	
32	Republic of Liberia	79.201	14.600											14.300		1
33	Luxembourg	45.750											5.200	30.214	0.400	
34	Laos	0.883											0.883	4.499		
35	Sweden	14.300												11.800		
36	Samoa	30.664													0.450	
37	Marshall Island	4.499														
38	Norway	11.800												5.489		
39	Qatar	4.500													4.500	
40	South Africa	1.309													1.309	
41	Taiwan	18.542											0.760		8.293	
42	Cook Islands	1.150													1.150	
43	Seyhelles	4.300													1.320	
44	New Zealand	6.950													6.950	4.000 *
45	Afghanistan	0.653													0.653	1
	Total	64100.064	7593.095	158.283	6065.675	719.702	205.720	984.764	329.580	19998.965	4644.460	1419.467	4107.055	8010.533	9481.275	13
																381.490

Source: Directorate of Investment and Company Administration- Myanmar (as of 22.8.2016)

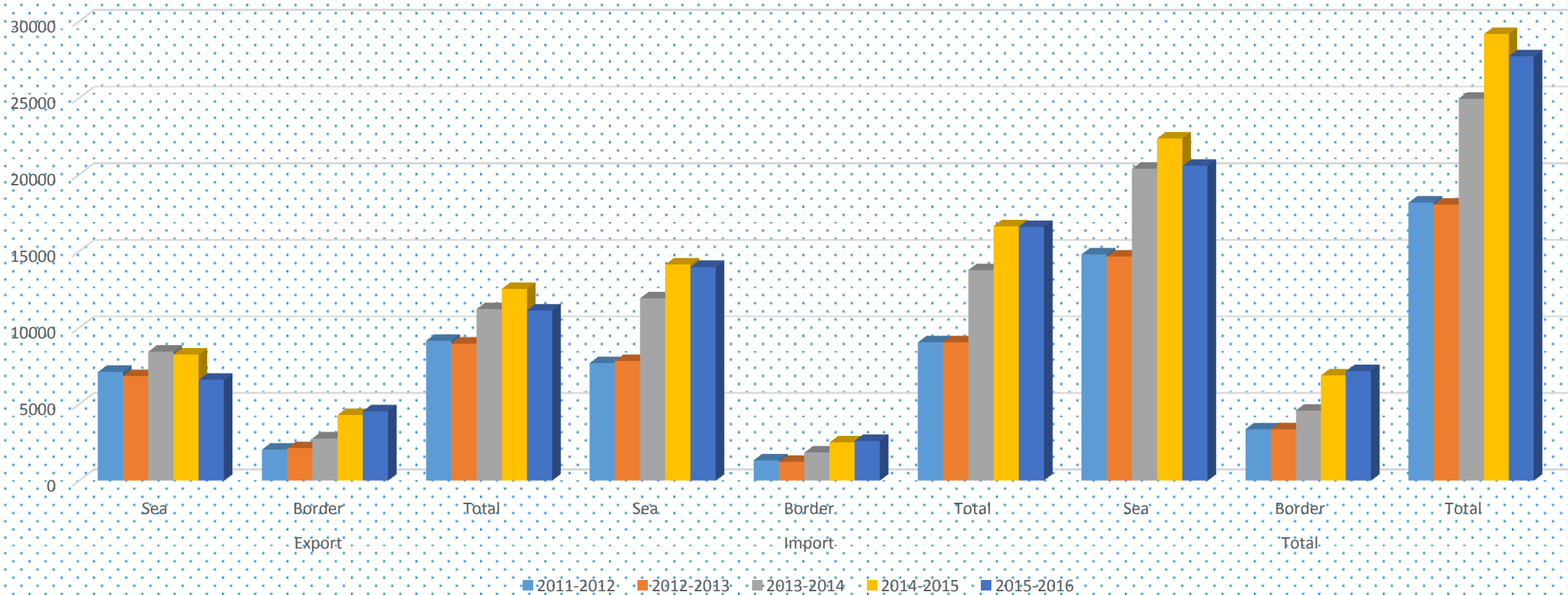
Myanmar Trade Data (Export/Import) (US\$ Million)

Years	Export			Import			Total		
	Sea	Border	Total	Sea	Border	Total	Sea	Border	Total
2011-2012	7107.208	2028.394	9135.602	7695.459	1339.604	9035.063	14802.667	3367.998	18170.665
2012-2013	6843.044	2133.971	8977.015	7830.359	1238.555	9068.914	14673.403	3372.526	18045.929
2013-2014	8442.767	2761.19	11203.957	11932.603	1826.904	13759.507	20375.37	4588.094	24963.464
2014-2015	8230.733	4292.984	12523.717	14139.006	2494.14	16633.146	22369.739	6878.124	29156.863
2015-2016	6587.948	4548.93	11136.878	13973.007	2604.941	16577.948	20560.955	7153.871	27714.826

Source: Ministry of Commerce, Myanmar (as of 22.8.2016)

Myanmar Export/Import during 2011-12 to 2015-16 August

Myanmar Export/Import (Sea, Border & Total)

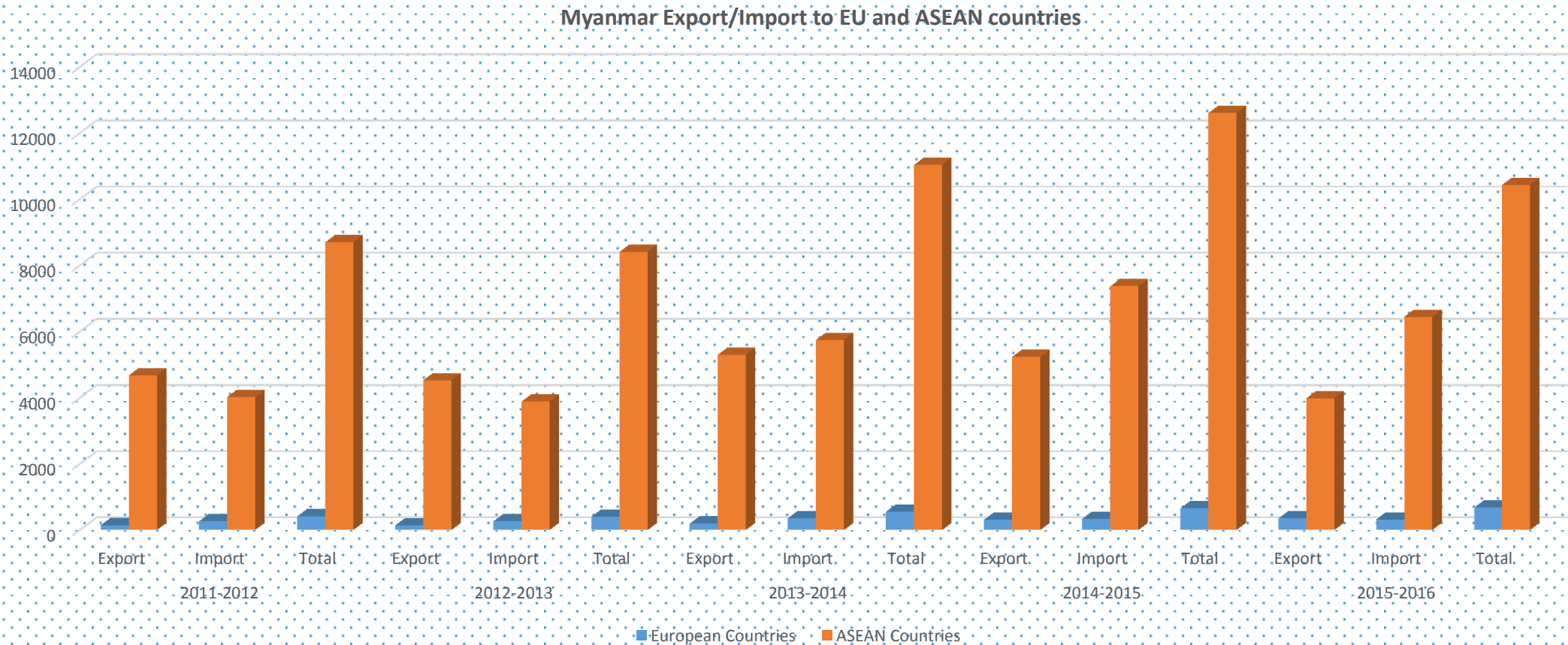


Myanmar Trade with EU and ASEAN countries 2011 to 2016 August (US \$ Million)

Countries	2011-2012			2012-2013			2013-2014			2014-2015			2015-2016		
	Export	Import	Total	Export	Import	Total	Export	Import	Total	Export	Import	Total	Export	Import	Total
European Countries	149.509	263.131	412.64	142.694	265.689	408.383	195.303	357.813	553.116	315.02	340.241	655.261	353.988	322.353	676.341
ASEAN Countries	4676.679	4020.561	8697.24	4529.772	3881.652	8411.424	5295.271	5742.876	11038.15	5236.167	7368.653	12604.82	3985.399	6447.131	10432.53

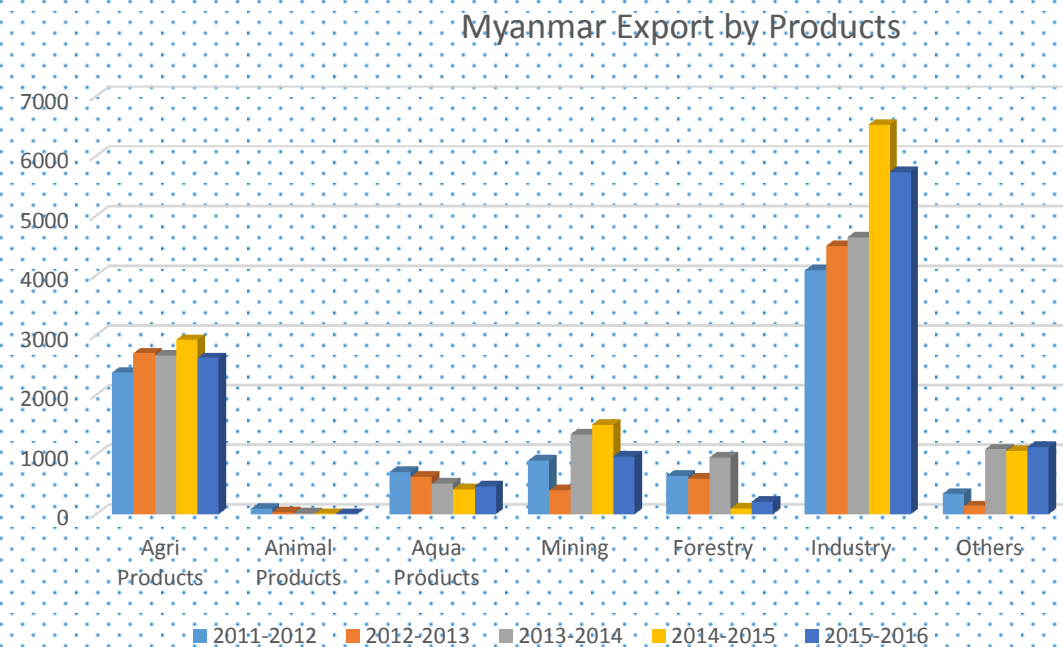
Source: Ministry of Commerce , Myanmar (as of 22.8.2016)

Myanmar Trade with EU Countries and ASEAN countries – Comparison (2011 to 2016 Aug)



Myanmar Export by Products (US \$ Million) 2011 to 2016 August

	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016
Agri Products	2372.561	2696.736	2661.011	2919.625	2615.774
Animal Products	90.689	32.887	15.42	8.287	8.007
Aqua Products	705.905	624.178	516.043	421.069	469.522
Mining	897.714	399.056	1339.455	1498.884	968.349
Forestry	641.989	595.646	948.028	94.395	212.965
Industry	4083.945	4492.871	4637.503	6524.612	5733.976
Others	342.799	135.641	1086.497	1056.845	1128.285
	9135.602	8977.015	11203.957	12523.72	11136.88

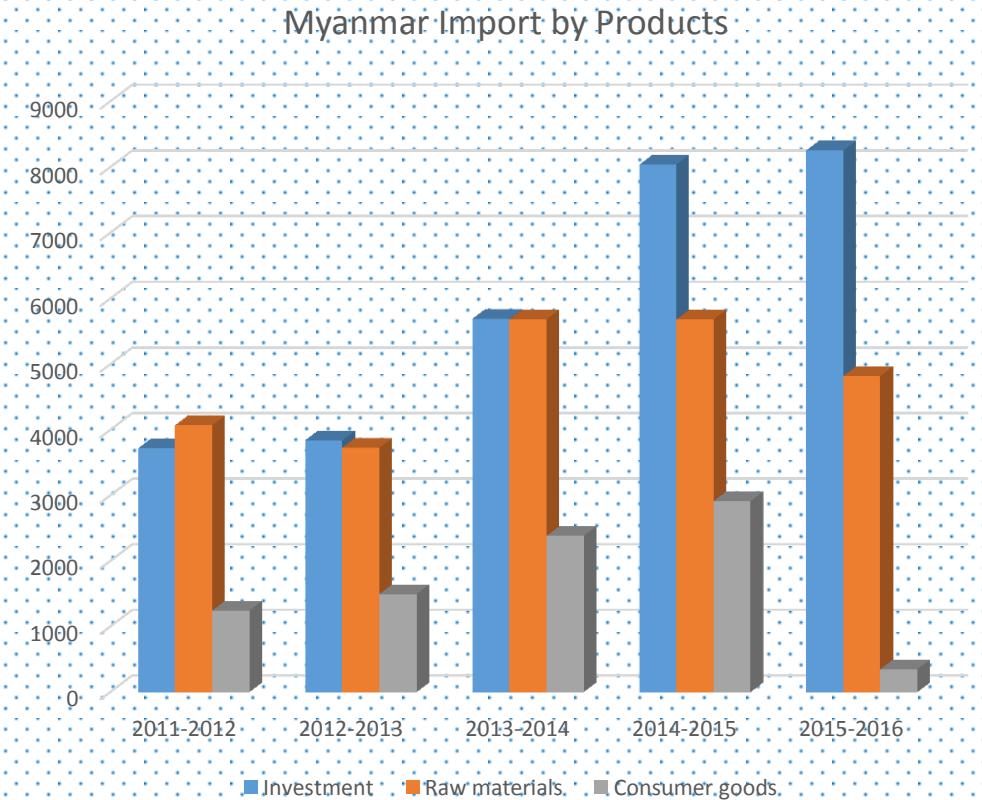


Source: Ministry of Commerce, Myanmar (as of 22.8.2016)

Myanmar Import by Products (US \$ Million)

2011-2016 August

	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016
Investment materials	3718.024	3842.453	5691.951	8037.561	8253.886
Raw materials	4071.566	3728.84	5684.034	5682.487	4820.716
Consumer goods	1245.473	1497.621	2383.522	2913.098	350.346



Source: Ministry of Commerce, Myanmar (as of 22.8.2016)

ASEAN Trade



ASEAN Trade Pattern

Diversity of exports

- Large exporters of fuels and minerals
- Agricultural products
- Manufactured products
- Commercial services

Less diversity of imports

- ASEAN members import sizable amounts of manufactured products

Exports

- Fuels and minerals

(Brunei Darussalam, Indonesia, Malaysia, and Myanmar)

- Agricultural products

(Indonesia, Myanmar and Viet Nam)

- Manufactured Products

(Cambodia, Malaysia, Philippines, Singapore, Thailand and Viet Nam)

- Commercial services

(Philippines and Singapore)

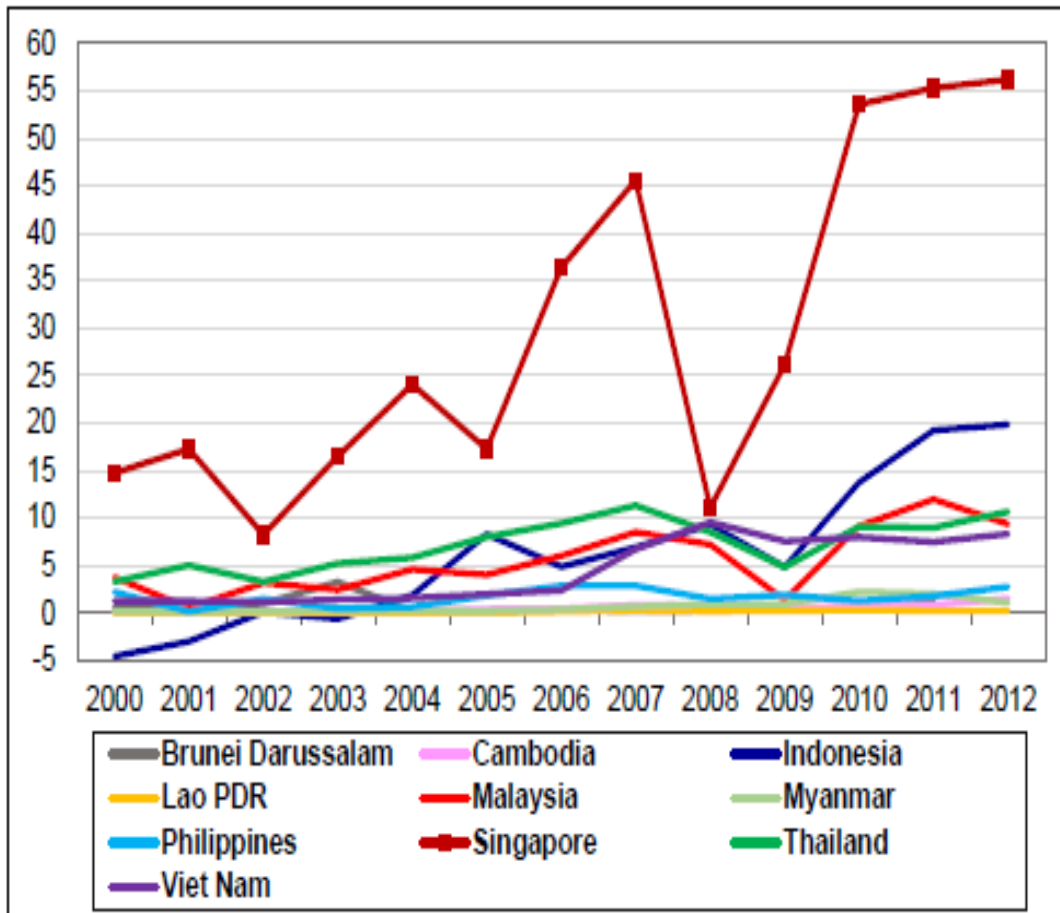
Imports

Less diverse in terms of import patterns – manufactured products

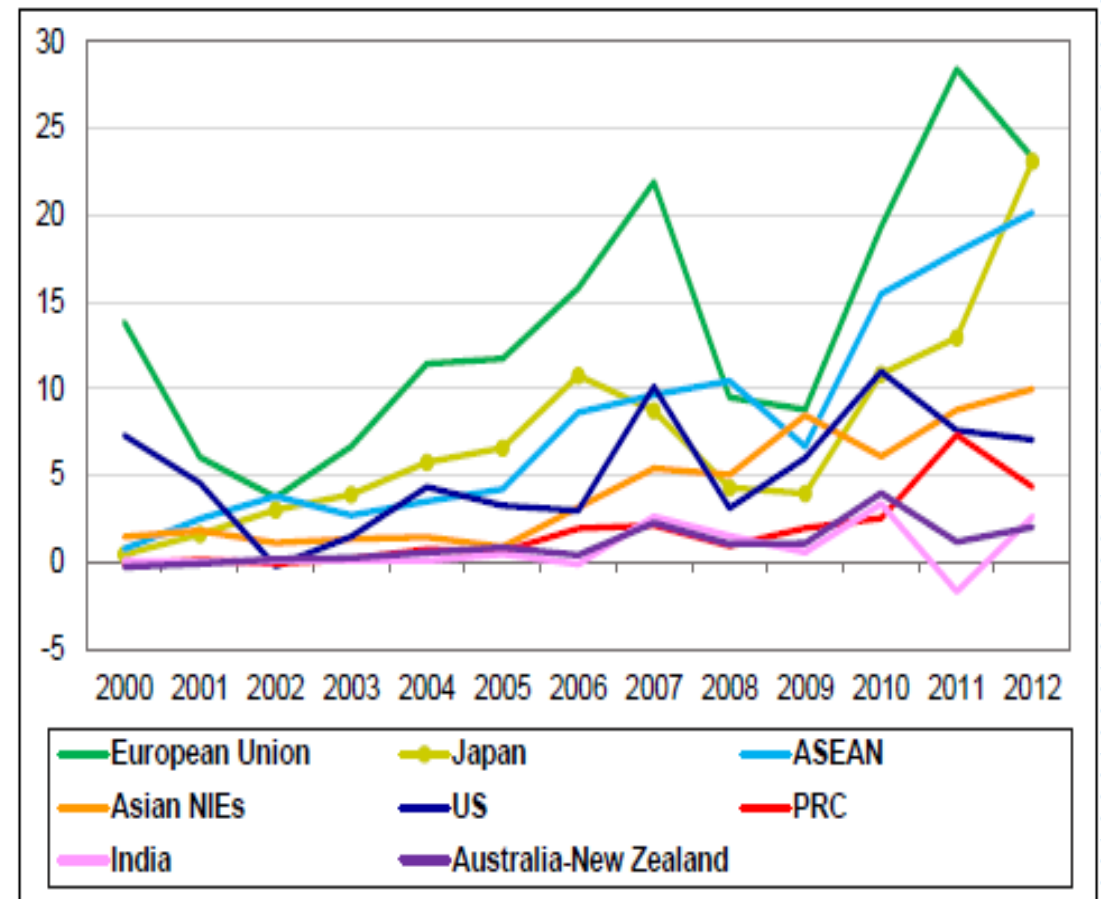


Foreign Direct Investment inflows

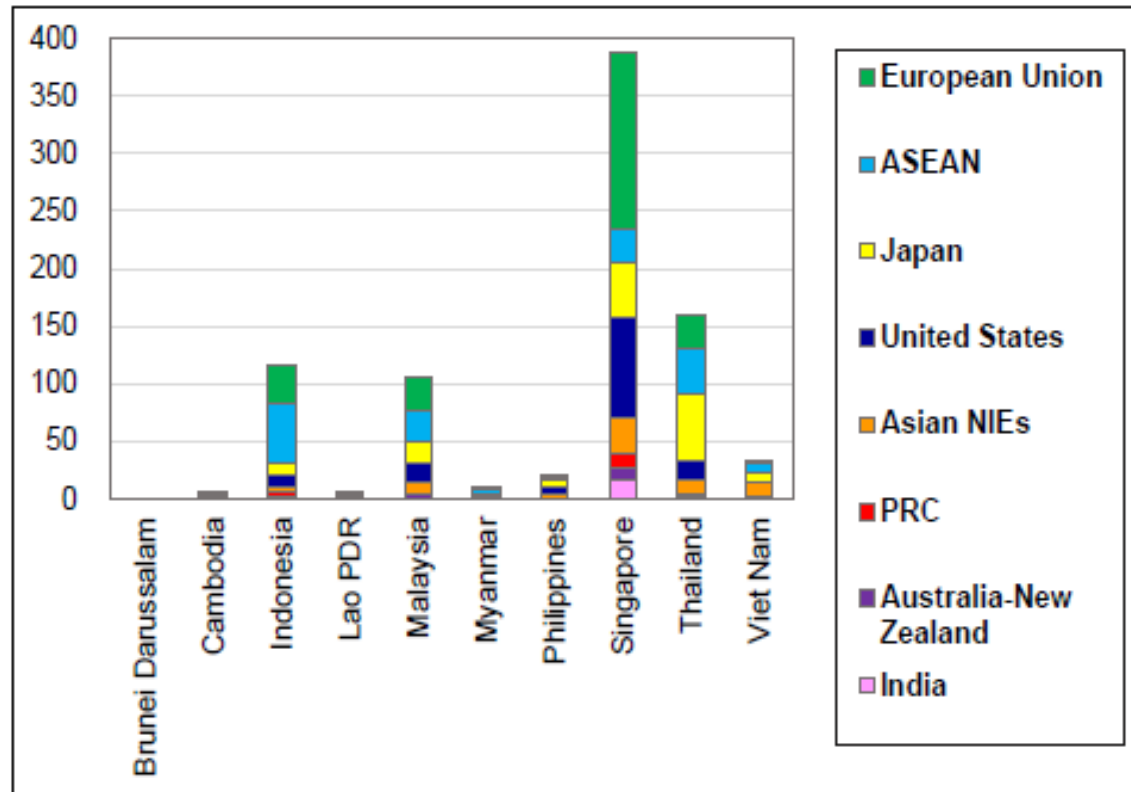
By countries



By source economy



Inward foreign Direct Investment stock in ASEAN



Singapore

Thailand

Indonesia

Malaysia

Largest recipient of FDI in ASEAN

Myanmar and Lao are the smallest recipient of FDI



Things to consider

Comparative advantages

When we talk about integrated and cohesive ASEAN economy through Trade, Investment, and Production Networks, we should always consider about the comparative advantages of each ASEAN countries.

ASEAN reservation list

Apart from the countries which are already engaged in supply chain activities in manufacturing production products, importing processed goods and parts and components and exporting parts and components, capital goods and final consumption goods, country like Myanmar, finds need to revise on ASEAN reservation list.

Level playing field vs. ease of doing business ranks

Group I	Group II	Group III	Group IV
Singapore (1)	Thailand (49)	Vietnam (90)	Lao (134)
Malaysia (18)	Brunei (84)	Philippine (103)	Myanmar (167)
		Indonesia (109)	
		Cambodia (127)	

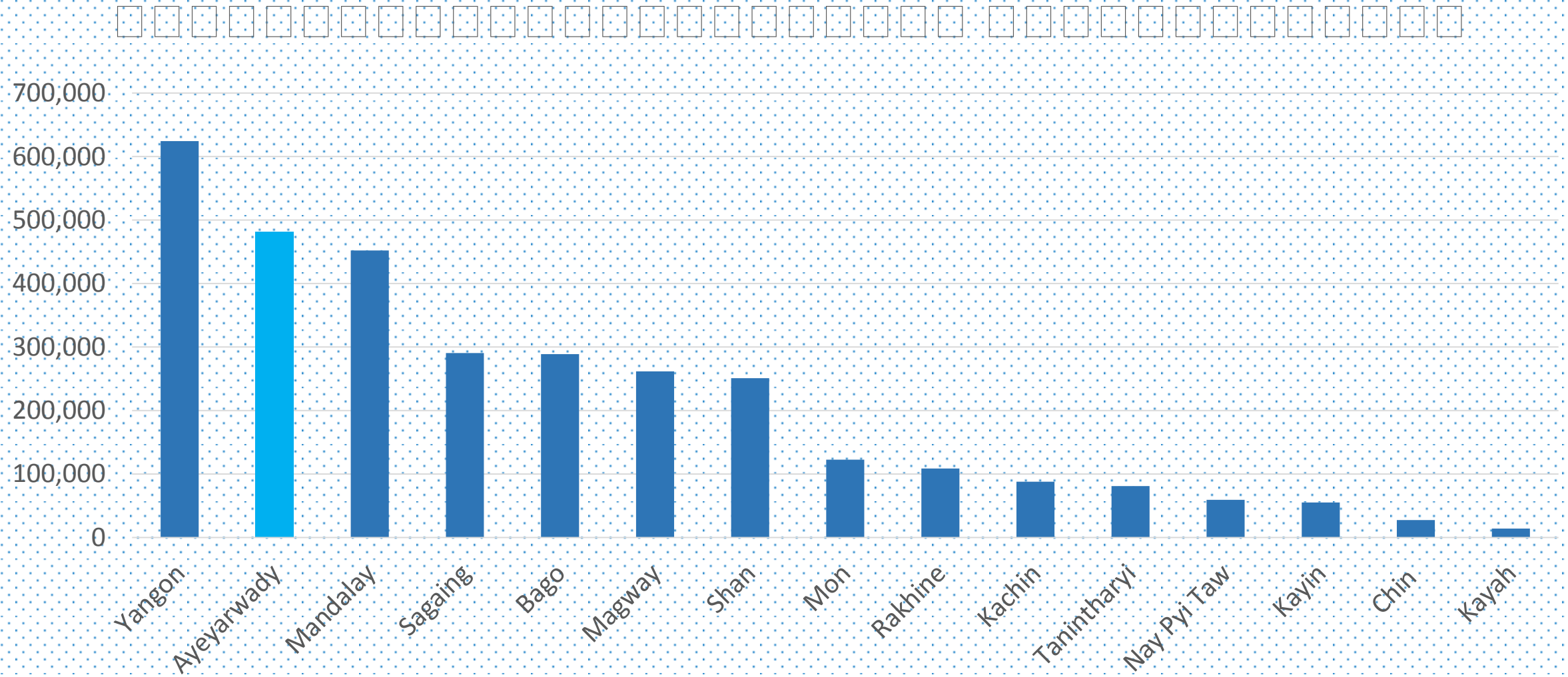
Ease of doing business 2016

Myanmar's perspective

- To maximize the benefits of AEC, all the member countries should be in same intensity or nearly the same intensity so that they can hold and in hand to reach the goal of AEC which is finally to build the region fully integrated into the global economy.
- ASEAN's low income countries still need a lot of assistance from ASEAN's high income countries in every aspects

Otherwise ...the aim to establish ASEAN community will far beyond reach in practice.

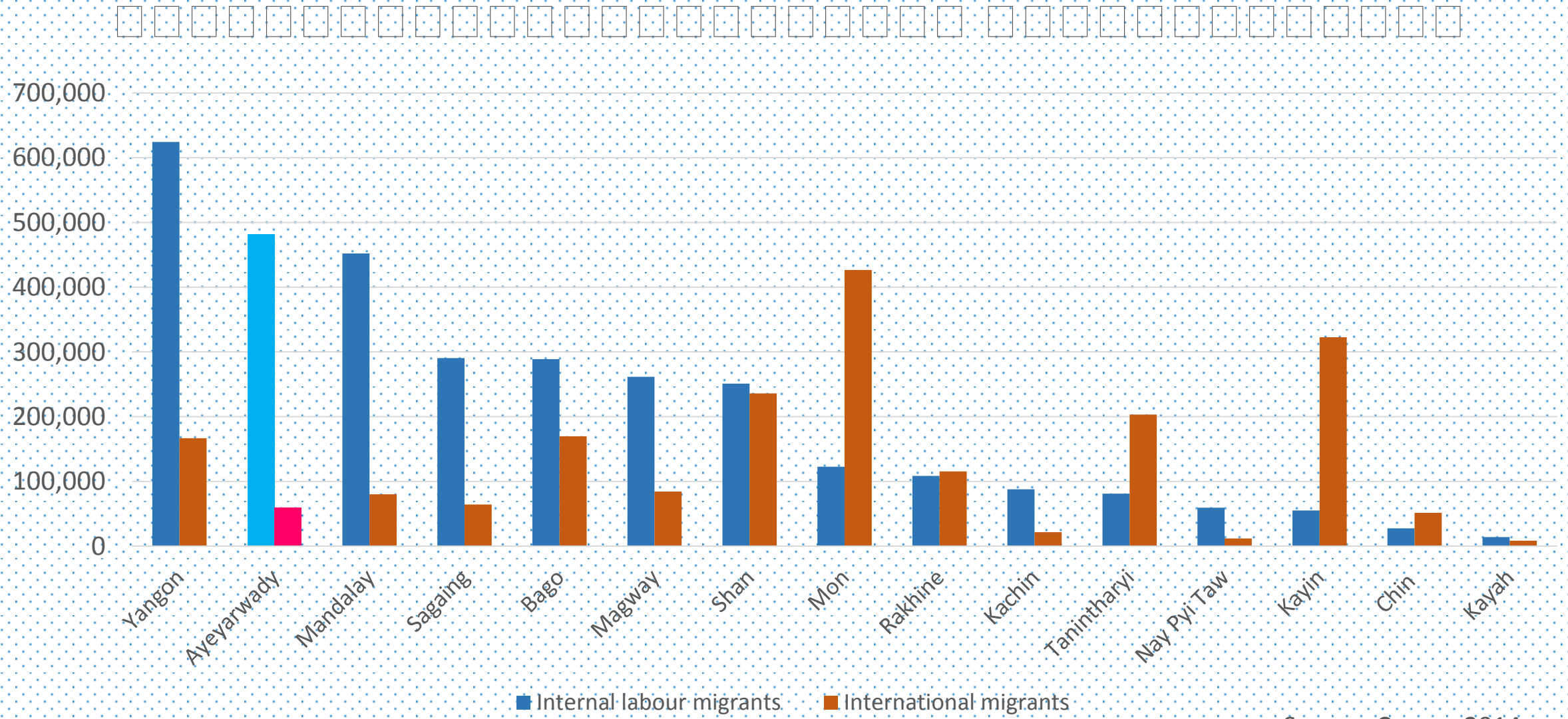
Where labour migrants came from*



* Previous usual residence of internal migrants in Myanmar

Source: Census 2014

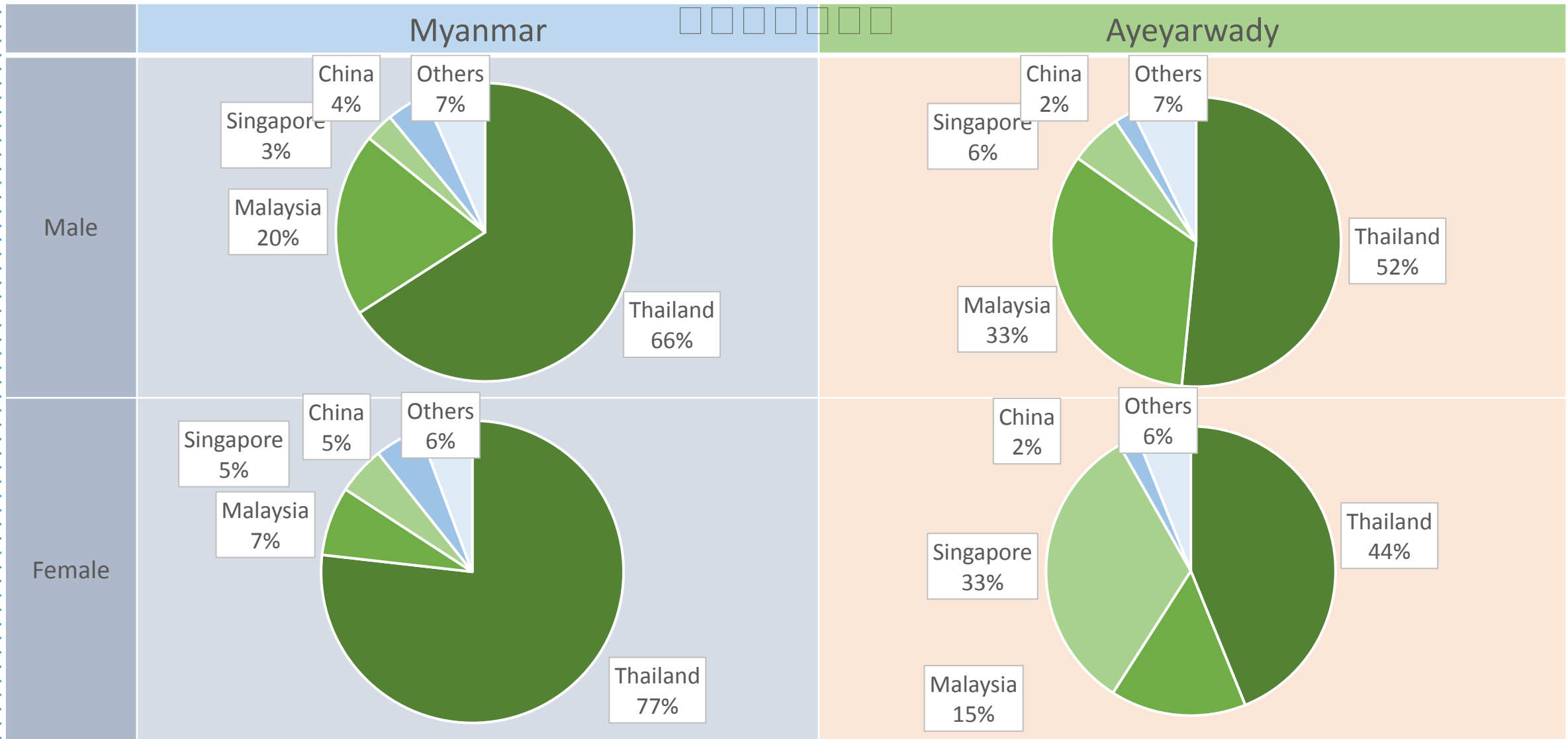
Where labour migrants came from*



* Previous usual residence of internal and international migrants

Source: Census 2014

International destinations of migrants



Thank you