



Impact of COVID-19 and Political Instability on the Border Trade of Myanmar

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Abstract: The border trade of Myanmar is important to its economy as a large proportion of external trade takes place through it. However, the COVID-19 pandemic and the military coup in 2021 posed a big challenge to this vibrant trade. The strict zero-COVID policy of China, its biggest trading partner, hampered trade while the border gate at Moreh in India remained closed after the military takeover of the country. The paper explores how the country is navigating through these difficult times so that border trade remains as vibrant as before. It is observed that one single export item that remained insulated from the pandemic and continues to earn precious foreign exchange for the country is natural gas. Further, a decline in trade with China and India is offset by more trade with Thailand. It needs to enter into trade negotiations with its neighbouring countries, especially with India and Bangladesh, where trade has not been high, indicating untapped potential.

Keywords: COVID-19, border trade, tourism, employment, agriculture

JEL: I15, F23, O53

1. INTRODUCTION

Myanmar has a geographical area of 6,76,552.697 sq. km with a population of 51.48 million in 2014. It is a big country with a small population and has a density of only 76 persons per sq. km. The country is predominantly agricultural, and the majority of the population depends on farming. Excess

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production of items like beans and pulses, rice, maize, melon, onion, etc., is exported, while its import basket consists mainly of industrial goods. It is also famous for timber production, especially teak, which is well known in the international market as Burma teak because of its good quality. Recently, Myanmar has been exporting gas and garments, which have become its biggest source of foreign exchange.

A peculiar feature of the external trade of Myanmar is the importance of border trade. This is largely due to its location, as big industrial countries like China, India, and Thailand surround it. However, the coming of COVID-19 and the resulting slowdown in trade have impacted its prospering economy, even though the spread in the country can be considered minimal. This trade is more susceptible to disturbances arising out of COVID-19, as people-to-people contact is more frequent. Then came the military coup in 2021, and the country witnessed widespread protests followed by sanctions affecting its economy. According to the data given by the World Bank (2023), the real GDP at constant prices was expected to have - 18% and 3% growth rates in 2020-21 and 2021-22, respectively. In another edition (World Bank, 2022a), it was said that the dual effect erased welfare gains made in the last decade as poverty worsened while inequality increased.

The paper aims to examine the border trade scenario of Myanmar in light of COVID-19 and the conflict situation in Myanmar. The study period is confined to the year 2023. It is divided into five sections. The second section gives a brief picture of the border trade of Myanmar, while the next section describes the impact of the pandemic and political instability on the border trade of the country. The fourth section concentrates on trade with China and India. The fifth is the conclusion.

2. BORDER TRADE OF MYANMAR

Myanmar shares its border with China, Bangladesh, India, Laos, and Thailand and officially engages in border trade with many of these countries.¹ The overseas trade value, including exports and imports, in 2018-19 was US\$24,859.48 million, while trade through its border was US\$10,287.54 million, i.e., almost 30 % of its international trade was done through the latter.² According to the information given on the Commerce Ministry website, Myanmar has twenty land border stations that engage in border trade with its neighbouring

countries. Muse, Lwejel, and Chin Shwehaw with China; Tarchileik, Myawaddy, Kawthaung, and Myeik with Thailand; Tamu and Rhi with India; Sittwe and Maung Daw with Bangladesh; Sittwe with Singapore are important trading stations. Thailand shares a long border with Myanmar, so the number of trading posts with it is the highest.



Figure 1: Location of some important trading border stations of Myanmar

Source: Google map for the boundaries

China has been an important trading partner of Myanmar, and about 80% of its exports to the country are done through the border (World Bank, 2022b). During the period between October 1, 2019, to March 19, 2020, a large proportion (45.54 %) of the border trade was done through Muse in Myanmar, which borders Ruili in China (Table 1). Altogether, 55.49 % of Myanmar's total border trade was done with China, followed by Thailand with 38.89 %, and trade volume with Bangladesh and India was comparatively low. However, a large number of exports from Myanmar to China and Thailand is natural gas, and if this is not considered, trade value with these countries will drop considerably. For example, Myanmar's natural gas export to China fetched 1.43 billion US dollars in 2022 (*The Global New Light of Myanmar*,

2023), while it was 2.41 billion US dollars in 2022 with Thailand, as per the information given on the Thai Commerce Ministry website. Trading between Myanmar and India is done mainly through other routes, not the border.

Table 1: Export-import via border stations of Myanmar (US\$ million)

	<i>Border Station</i>	<i>Export</i>	<i>Import</i>	<i>Total</i>	<i>%</i>
	Myanmar-China	1905.347	852.042	2757.389	55.49
1	Muse	1471.815	791.352	2263.167	45.54
2	Lwejel	54.667	7.904	62.571	1.26
3	Chin Shwehaw	208.512	43.535	252.047	5.07
4	Kanpitete	168.022	8.044	176.066	3.54
5	Kyaing Tong	2.331	1.207	3.538	0.07
	Myanmar-Thailand	1412.326	520.473	1932.799	38.89
6	Tarchileik	25.081	38.164	63.245	1.27
7	Myawaddy	166.113	383.592	549.705	11.06
8	Kawthaung	144.268	25.583	169.851	3.42
9	Myeik	35.981	55.378	91.359	1.84
10	Nabulae/Hteekhee	1030.417	14.046	1044.463	21.02
11	Mawtaung	8.44	3.47	11.91	0.24
12	Mese	2.026	0.24	2.266	0.05
13	Sittwe	0	0	0	0.00
	Myanmar-Bangladesh	20.541	5.445	25.986	0.52
14	Sittwe	11.913	5.416	17.329	0.35
15	Maung Daw	8.628	0.029	8.657	0.17
	Myanmar- India	68.345	2.206	70.551	1.42
16	Tamu	33.880	0.328	34.208	0.69
17	Rhi	34.465	1.878	36.343	0.73
18	Htan Ta Lan	0	0	0	0.00
	Myanmar-Laos	0.41	0	0.41	0.01
19	Kenglap	0.41	0	0.41	0.01
	Myanmar-Singapore	0	273.257	273.257	5.50
20	Sittwe	0	273.257	273.257	5.50
		3512.02	1457.501	4969.521	100.00

Source: Ministry of Commerce, Myanmar, Border trade data
<https://www.commerce.gov.mm/en/dobt/border-trade-data>

Note: The period is from 1-10-2019 to 19-3-2020. This period has been chosen as it represents the latest data before the spread of the virus.

Border trade is beneficial to Myanmar in several ways. It reduces transport costs and saves time, which is essential for transporting perishable

agricultural produce like melon, corn, fish, vegetables, etc., as agricultural items are a major component of exports in the border trade of Myanmar. The additional benefit of the farming sector is the involvement of many farmers in the production, even though the output value may not be very high. According to information from the World Bank, the sector employed about 48.93% of the total employment in the country in 2019.³ Border trade is also done informally, thus benefiting many small traders with little capital. This helps in employment generation, whereas the involvement of people in formal trade through other means, like sea and air, can be significantly less. It also benefits people, especially in border areas, in terms of lower prices and the availability of more goods.

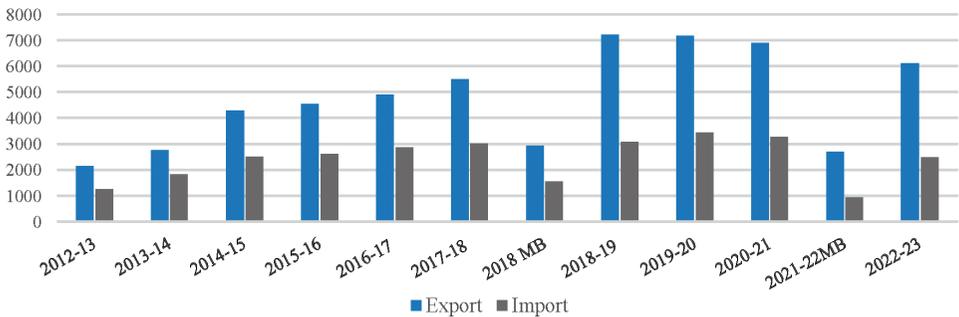


Figure 2: Border trade of Myanmar (US\$ million)

Source: Ministry of Commerce, Myanmar, Border trade data
<https://www.commerce.gov.mm/en/dobt/border-trade-data>

Note: Two important points can be noted. First, 2018 MB stands for mini budget, which runs from April 1, 2018, to September 30, 2018, while 2020-21 MB is from October 2021 to March 2022. This has been due to the changing definition of a fiscal year based on whether it runs from April to March next year or from October to September next year. Second, there is a sudden rise in the value of border trade in the year 2018-19, and this might be due to the inclusion of exports through pipelines or gas in border trade (see Chan Mya Htwe, 2019).

Another significant advantage of the border trade of Myanmar is the positive balance of trade it enjoys, which is also increasing over time (Figure 2). In 2012-13, the balance was just US \$ 895.42 million, which had risen to US \$ 4150.80 million in the year 2018-19. On the other hand, there was a negative trade balance by a considerable margin in overseas trade, and the figure was as high as US \$ 5176.98 million in 2018-19.

3. IMPACT OF COVID-19 AND POLITICAL INSTABILITY ON BORDER TRADE

The COVID-19 pandemic affected many sectors of the economy. Hayakawa and Mukunoki (2021) said industries should be grouped into essentials and non-essentials while studying the impact of the pandemic. Non-essential goods and services are those items whose consumption can be deferred, and there can be a decline in demand for them, but not for essentials like medical products. Their observation has been corroborated by others. Mezzadri and Rupanwara (2020) said that an industry that was a beneficiary of the pandemic was the health sector, as there was a shift in production towards healthcare needs like face masks, protective gowns, gloves, etc. Arita et al. (2022) did an analysis of trade in the agricultural sector for the year 2020. They observed that agricultural trade did witness a slight fall, but had an insignificant effect on food and bulk agricultural items. However, non-food items, meat and seafood, and higher-value agricultural products were severely impacted. Murali and Palit (2021) observed that Indian agriculture was less affected, and exports grew largely due to restrictions on food exports by other countries and favourable weather conditions in the country. Kumar (2022) mentioned that the increase in exports of India in 2020-21 was dominated by items like wheat, non-basmati rice, vegetable oil, molasses, etc. Export of medical herbs, grains and oil, which can be termed as essentials, increased although agricultural exports fell in general during the pandemic in China (Ben-xi & Zhang, 2020).

The travel industry suffered the most, while industries related to information technology, pharmaceutical items related to the pandemic, home office equipment, etc., witnessed higher demand (UNCTAD, 2022). Similar observations were made by Ando and Hayakawa (2022), Abay et al. (2020), and OECD (2022), though the number of industries covered in their studies differed. They said that trade in services suffered more because it involves more people-to-people contact. Travel and transport were the hardest hit, while those services that involved digital services were least affected.

In the energy sector, it has been widely reported that demand for petrol weakened during the pandemic as people preferred to stay at home. For example, demand for petroleum in India fell by as much as 18% in March 2020 alone as compared to March 2019 (Abdi, 2020), while it is reported that oil prices fell from \$18 a barrel to - \$0.38 a barrel at a time due to oversupply

and lack of storage facilities in the US (Ambrose, 2020). Taiwan's electricity demand, on the other hand, increased during the COVID-19 pandemic. This was due to higher demand by certain industries, and people preferred to stay at home and work (Tsai, 2021).

Much of the available literature deals little with border trade and Myanmar in particular. The present study hopes to fill this gap to some extent. COVID-19 came to Myanmar very late. The first reported case was made on March 23, 2020, of two individuals with travel history abroad. Till August, the number of new infections remained low, but started to rise in September and peaked in October-December 2020, as per the data given by the WHO. The daily number of new cases detected on March 13, 2021, was down to only 8 cases. Myanmar took up preventive measures, resulting in the disruption of trade and commerce.⁴ Myanmar cancelled all visas for foreigners except a few, commercial flights were suspended, restaurants were closed except for takeaway services, public gatherings were banned, schools and universities remained shut, restrictions and lockdowns of certain townships were imposed, etc. The measures were subjected to review from time to time. The next wave was even more severe and peaked in July 2021 due to the Delta variant. *The Irrawaddy* (2021) reported that the military ordered a stay-at-home order to control the spread of the virus, which led to 145 fatalities in a single day. COVID-19 infections in Myanmar, however, can be considered minimal, and the highest number of infections in a single day was only about 7000 in the latter part of 2021.

Myanmar engages in border trade with several countries, as indicated earlier. In this section, we briefly touch upon border trade relations with China, Thailand, and India. It is seen from Figures 3 and 4 that China has been its biggest trading partner, followed by Thailand, while trade with India is minimal. Exports to China gradually rose, touching a record US \$ 4973.74 million in the year 2017-18. It had gone down during 2018-19 and 2020-21 but sharply deteriorated in 2022-23. Similarly, in the case of imports, a substantial fall in Chinese exports to the country during 2020-21 and 2022-23 was observed. On the other hand, border trade with Thailand by and large prospered and replaced the position of China as its biggest trading partner in 2021-22 MB and 2022-23. In 2022-23, Myanmar's exports to Thailand and China in border trade were US \$ 3479.87 million and US \$ 2539.67 million,

respectively, while imports from the two countries were US \$ 1875.51 million and US \$ 561.88 million. This is perhaps due to trade restrictions in China along the border due to COVID, and it also could reflect cooperation between the two governments, Myanmar and Thailand, both ruled by the military.

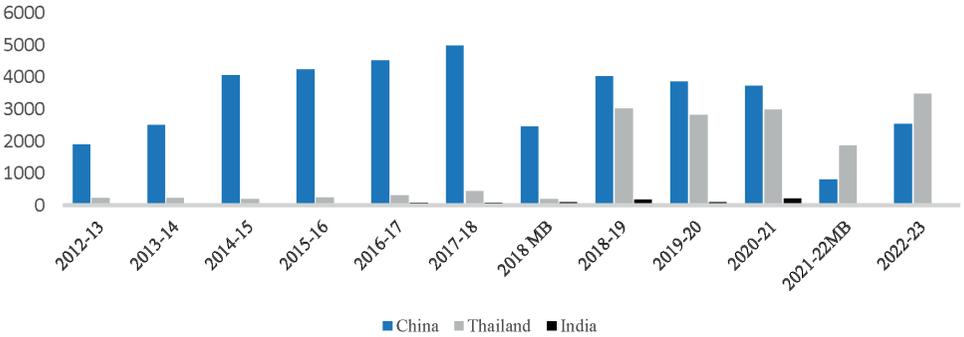


Figure 3: Export of Myanmar at the border (\$ million)

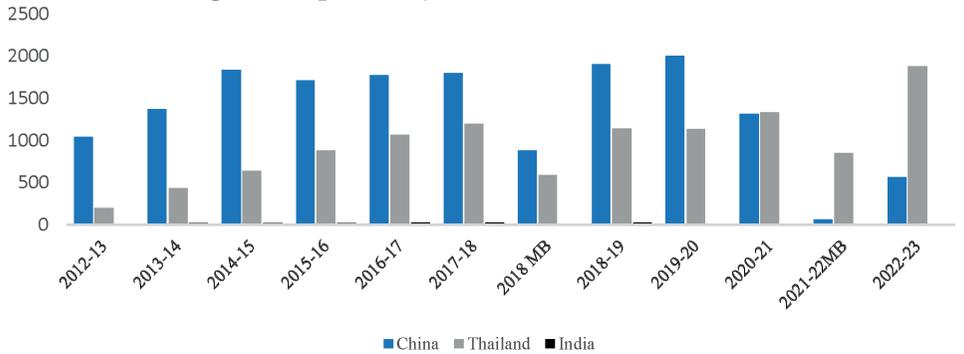


Figure 4: Import of Myanmar at the border (\$ million)

Source: Ministry of Commerce, Myanmar, Border trade data
<https://www.commerce.gov.mm/en/dobt/border-trade-data>

Note: Exports to Thailand witnessed a jump in the year 2018-19, and this was due to the categorisation of exports of gas through **Tanintharyi Region as border trade. It was classified as an overseas trade before** (Chan Mya Htwe, 2019). 2021-22 MB covers the period October 2021- March 2022.

The largest export of Myanmar to Thailand is gas. In 2021 total export of gas was US \$ 1715.67 million, but rose to US \$ 2412.13 million in the subsequent year, garnering 98.42% of the total increase in exports. The increase in imports of Myanmar from Thailand has been dominated by manufacturing items and fuel. Thailand-Myanmar border trade was affected by COVID-19, but their land border is quite long and has many trading stations, and, as such,

trade, by and large, remained unaffected. Both exports and imports were down marginally in the year 2019-20 only.

Item-wise exports of Myanmar through the border given in Table 2 show that overall trade has continued to decline since 2019-20; the steepest fall is seen in the case of agricultural items. It declined from as high as \$ 2744.62 million in 2020-21 to \$1285.58 million in 2022-23. The export of manufactured items stood at \$ 4298.49 million in 2022-23 as against the previous highest figure of \$4142.379 million in 2018-19. A breakup of what constitutes manufactured goods is not available, but it is reported to be mostly gas and garments (World Bank, 2021). However, trade through pipeline (gas) and land is segregated in Figure 5, which indicates a substantial decline in border trade in 2022-23 with a steep rise in gas exports.

Table 2: Export by items at the border (US\$ million)

	2018-19	2019-20	2020-21	2021-22 MB	2022-23
Agriculture products	1735.255	1855.075	2744.618	458.692	1285.58
Animal products	361.826	104.021	14.749	1.059	16.08
Marine products	435.876	524.472	387.412	219.038	358.38
Mineral products	305.732	364.918	49.512	2.621	27.61
Forest products	2.549	3.936	5.157	1.173	3.96
Manufacture products	4142.379	3776.895	3507.316	1962.293	4298.49
Others	235.552	558.622	200.12	42.192	121.98
	7219.169	7187.939	6908.884	2687.788	6112.08

Source: <https://www.commerce.gov.mm>

Note: The 2021-22 figure is from October 2021 to March 2022.

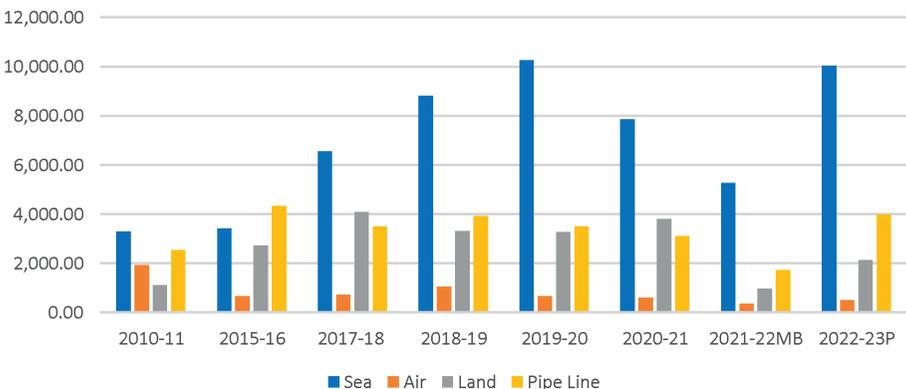


Figure 5: Export of Myanmar by route (US\$ million)

Data source: Statistical Yearbook of Myanmar 2023

4. DECLINING BORDER TRADE WITH CHINA AND INDIA

Two countries, China and India, have been selected for a deeper study into the impact of the current problem on border trade. China is its biggest trading partner, while for India, the border trade has almost gone down to a minimal level. Some informal trade continues, but cross-border tourism has come to a complete halt.

4.1. Trade with China

Total exports to China through the border were US \$ 4010.72 million in 2018-19 but dropped by 36.67 % in 2022-23, while imports went down steeply from US \$1898.71 million to US \$ 561.88 million (70%) during the same period. This might be because China has suffered more from COVID-19, and the number of new infections was the highest in the latter part of 2022. Its zero-COVID policy or control measures were also severe. Quoting from various sources, the World Bank (2021) said some of the limitations include border closure, restrictions on Myanmar trucks and drivers from entering China, and a ban on the import of seven items, including rice. Initially, Myanmar trucks and drivers were not allowed to enter China, and they had to hire Chinese vehicles, which caused delays and a reduction in profit. However, after May 16, 2022, only drivers need to be substituted, easing trade to some extent (*The Global New Light of Myanmar*, 2022).

Reports of trade suffering due to the pandemic are abound. One of the sectors worst hit was agriculture, especially among the melon growers. Watermelon is a new crop in Myanmar and gives much more profit to the farmers than traditional crops.⁵ It is further said that about 150,000 farmers grow melons in Myanmar, and 867,000 tonnes of the produce are sold to China (USAID & WINROCK International, 2019). Due to the closure of the border on the Chinese side after the emergence of COVID-19, it was estimated that a sum of US \$ 55 million was lost in just one month on exports of watermelon and muskmelon, according to the Myanmar Watermelon and Muskmelon Producers and Exporters Association (Nyein Nyein, 2020). Maize is another important crop in Myanmar, and about 100 tons of the crop, which was bound for China, were dumped into the river every day because of the restrictions at the border (Chan Mya Htwe & Aung Loon, 2020). Rice exports from Myanmar were down from 30,000 bags a day to 10,000 bags a day due

to the closure of Man Wein checkpoint, a major rice export hub to China (*The Global New Light of Myanmar*, 2021), in the wake of the COVID-19 outbreak. Table 3 gives data on the import of some items by China from Myanmar, and the fall in Chinese imports of fruits in 2020 and 2021 is visible. The import of rice and natural gas remained, by and large, unaffected. However, border trade data from a source is not likely to be accurate because of informal trade, which is often unrecorded.

Table 3: Import of China from Myanmar (US\$ million)

	<i>HS code</i>	2019	2020	2021	2022
Edible fruits and nuts; peel of citrus fruit or melons (BT)	08	0.092	0.001	2.306	14.481
Edible fruits and nuts; peel of citrus fruit or melons (OT)	08	31.726	4.413	2.926	11.080
Melons and papayas (BT)	0807	0.065	0.0	0.172	6.281
Melons and papayas (OT)	0807	1.902	0	0.084	0.018
Rice (BT)	1006	0.084	12.007	19.052	52.640
Rice (OT)	1006	56.189	78.471	40.774	88.629
Maize (OT)	1005	30.717	37.636	9.495	60.799
Natural gas (OT)	27112100	1754.933	1424.715	1411.686	1431.318

Source: China Customs

Note: Trading partner-Myanmar, Customs regime - Ordinary trade and border trade, Location of exporters and importers-Yunnan Province. The explanations did not differentiate between ordinary trade (OT) and border trade (BT). However, ordinary trade is usually done by registered firms and pays usual taxes, while border trade is usually done by small traders and not necessarily by registered firms.

To ease trade from fluctuating exchange rates and also to conserve dollars, the Myanmar government announced that for border trade with China, only those who have adequate Chinese Yuan can purchase goods from its neighbours (The Irrawaddy, 2023).⁶ Similar negotiations with other neighbouring countries to use local currencies in border trade are reported to be taking place.

4.2. Trade with India

Myanmar officially does trade with India in two border stations, Moreh and Rhi, which are in Manipur and Mizoram states. They border the towns of Tamu and Zowkhardar in Myanmar, which are in Sagaing and Chin states/regions, respectively. Informal trade is very popular and the reason is that many of the

people involved with the business are small traders with little capital, use of local currency, quick return as demand for imported goods is high, etc. (Singh, 2016). Trade data available from the Indian side mainly relates to formal trade only, while data available in Myanmar most likely relates to both formal and informal trade.⁷ Therefore, we rely on Myanmar data to get a more complete picture, even though it may still be incomplete and may miss information for items like timber traded in remote areas of the border. Exports through Tamu and Rhi are given in Figure 6, and the low trade values may reflect border closures. The border gate at Moreh-Tamu was closed in March 2020 and opened again in September of the same year. However, it has remained closed since the early part of 2021 after the political tension in Myanmar.⁸ Some Myanmar traders were allowed to come to Moreh for a limited time in a day to sell their merchandise, and the trade value is not completely zero. Recent Myanmar trade data shows almost nil or zero trade at the Rhi border gate, and, hence, it may also be closed for trade.

Lockdowns and border closures, especially in Moreh-Tamu, had a tremendous effect on the livelihood of traders. There are many shops in Nan Phar Lone in Tamu where buyers from India would come to shop, and the daily loss due to closure was estimated to be 500 million kyats (Soe Thu Aung, 2020). Approximating to Rs 1 = 20 kyats, the prevailing exchange rate at that time, the value comes out to be Rs 2.5 crores daily or Rs 75 crores in a month

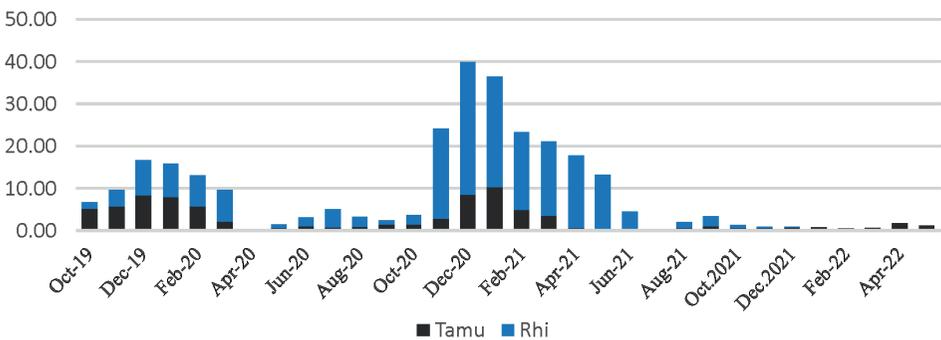


Figure 6: Export of Myanmar to India (US\$ million)

Data source: <https://www.commerce.gov.mm/en/dobt/border-trade-data>

Note: Monthly border trade data of Myanmar is not available. It is available for a certain period in the current year. For example, it is available for periods 1st October 2019 - 1st November 2019, 1st October 2019 - 6th December 2019, 1st October 2019 - 3rd January 20 and so on. With some adjustments, we estimated the monthly trade data of Myanmar with India.

or about \$ 10 million. In Table 1, exports of Myanmar to India through Tamu and Rhi are almost the same, and hence the loss in exports to India through the border could be around \$ 20 million in a month or \$ 240 million in a year when both the border gates are closed. Though the figures cannot be verified, the information reveals that the closure of border trade hurts the Myanmar traders much more, as the country used to enjoy a favourable trade balance.

CONCLUSION

Myanmar is heavily dependent on tourism and external trade for its economic prosperity. As a result, the coming of COVID-19 has caused a difficult economic situation in the country. The problem has been compounded by the recent military coup, followed by widespread sanctions and the flight of investments away from the country. Tourism has come to a standstill while border trade has been disrupted due to the border closure. Much of the trade at the border, which is taking place now, is mainly the export of natural gas through the pipelines, especially to Thailand, to meet its energy needs.

Once the COVID-19 problem is solved and the political situation in Myanmar is back to normalcy, there is every reason to believe Myanmar's border trade will thrive. It needs to enter trade negotiations with its neighbouring countries, especially with India and Bangladesh, where trade has not been high, indicating untapped potential. India's border trade stations are not as active as China's and Thailand's. To increase border trade activities, India should put a thrust on promoting border trade as well as setting up new, vibrant border stations. Border trade infrastructure needs timely completion to establish a vibrant border development zone.

Notes

1. Recent data show border trade with Singapore though Sittwe as well.
2. It is pertinent to mention that border trade data is never accurate. It may differ from one source to another and often does not include informal trade which can be very high. For the present study, we rely primarily use data supplied by the Ministry of Commerce, Government of Myanmar, on border trade.
3. See World Bank indicators at <https://data.worldbank.org/indicator/SL.AGR.EMPL.ZS>
4. See The Myanmar Times (2020), Nan Lwin (2020), and Ministry of Health and Sports (2020) for government response to prevent COVID-19 in Myanmar.

5. See Koji (2018) on cultivation and export of watermelon in Myanmar.
6. The Myanmar currency Kyat suffered a large depreciation in 2021. For example, in 2018 an Indian Rupee was equal to around 20 Kyats but today it is over 24 Kyats.
7. As export import figures are much more than formal trade data available LCS Moreh.
8. See Banka (2021) for the hardship caused to the traders due to the closure of the border.

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