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Report Name: Fresh Fruit Production Consumption and Export Opportunities in Burma

Country: Burma - Union of

Post: Rangoon

Report Category: Avocado, Canned Deciduous Fruit, Dried Fruit, Fresh Deciduous Fruit, Fresh Fruit, Kiwifruit, Raisins, Stone Fruit, Strawberries

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Report Highlights:

This report provides an overview of Burma's fruit market and highlights opportunities for U.S. fruit exporters to Burma. China and Thailand are Burma's primary trading partners. Imports of U.S. fruits typically arrive overland from Thailand. Despite political, economic and environmental challenges, there is a growing market for imported fruits in Burma. The most promising prospects for U.S. fruit suppliers to Burma include apples, cherries, mandarins, peaches, grapes, oranges, lemons, strawberries, and blueberries.

Summary

Burma’s socio-economic situation, fluctuating supply chains, and complex import requirements shape fresh fruit consumption. Nevertheless, increasing health awareness among urban consumers supports growing fruit demand. Imported fruits can pose significant competition to locally produced options as the larger size and appearance of fruit imports are more appealing to consumers. The availability of domestic fruits fluctuates due to inconsistent production and distribution, while imported fruits generally maintain consistent availability due to established supply chains. U.S. fresh fruit exports to Burma, which are predominantly transported via land routes through Thailand, face several significant challenges. These include ongoing economic and supply chain disruptions stemming from the civil conflict, onerous import regulations, and reduced consumer purchasing power due to the continuing depreciation of the Burmese kyat.

I. Production

Burma benefits from three agro-climatic conditions: tropical, subtropical, and sub-temperate climates, along with diverse soil compositions, topographical features, and regional climatic variations, all of which create favorable conditions for the cultivation of a wide array of fruits year-round.

The top five fruits produced in Burma are mangoes, plums, pineapples, oranges, and watermelons (Table 1). Mango is the most widely grown domestic fruit, and its varieties are primarily cultivated in the lower regions of Burma, especially in Ayeyarwady, Mandalay, and Sagaing. Pineapples and avocados are grown in the northern areas, particularly in the hilly regions of Shan state. These same hilly areas also produce smaller quantities of deciduous fruits like apples, pears, and apricots. Shan state areas along the borders with China and Thailand are also involved in fruit cultivation, including plums and oranges. Watermelons are mainly grown in Burma's central dry zone, with key production areas in Ayeyarwady, Sagaing, Mandalay, and Shan regions.

Table 1. Fruit Production in Burma by Burmese Fiscal Year (April through March) (in metric tons (MT))

Rank	Crop	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	Percentage of Change 2022/23 vs 2023/24
1	Mango	622,644	753,212	694,865	641,363	631,514	757,332	761,742	1%
2	Jujube, Plum	349,431	299,542	303,125	273,093	297,754	359,891	353,205	-2%
3	Pineapple	245,452	288,900	300,696	245,191	250,921	262,259	280,173	6%
4	Orange	360,596	355,831	355,870	301,599	251,201	249,375	274,926	9%
5	Watermelon	323,543	334,484	344,114	292,402	514,945	142,275	195,551	27%
6	Tamarind	168,369	179,057	180,571	160,742	153,023	145,730	138,190	-5%
7	Pomelo,Sweet Lime	95,974	98,169	94,602	87,855	79,662	104,951	109,592	4%
8	Lemon	61,464	62,309	63,365	48,913	56,794	57,496	58,567	2%
9	Durian	43,125	49,947	49,076	48,447	45,593	50,116	50,971	2%
10	Grapes	31,233	33,342	33,819	34,378	34,051	34,043	34,036	0%
11	Custard apple	21,877	23,287	23,758	22,785	22,559	23,661	23,495	-1%
13	Lichee	10,567	11,514	10,525	10,623	9,405	11,168	10,429	-7%
14	Pear	19,060	17,314	17,276	11,928	10,950	10,911	9,729	-12%
15	Apple	5,426	4,631	4,585	4,533	4,540	6,569	3,390	-94%
16	Strawberry	1,604	1,600	1,645	1,488	1,534	750	952	21%

Source: Myanmar Agriculture at a Glance

II. Consumption

Euromonitor reports that the fruit market in Burma reached 8.7 million metric tons (MT) in 2024, marking a 4 percent increase from 8.3 million MT in 2023.

Burma's most widely available and commonly consumed fruits are bananas, papayas, coconuts, guavas, various citrus fruits (e.g., limes and pomelos), watermelons, plums, grapes, and pineapples. Mangoes, rambutan, durian, and mangosteen are abundant between March and May, while apples, plums, oranges, citrus, and pears are more common during the cooler November to February season. Fruit consumption typically aligns with availability and specific holidays. (e.g., Chinese New Year in February, the Thingyan festival in April, the Thadinyut festival in October, and Christmas in December). During these special days, both local fruits and imported items (e.g., cherries, blueberries, apples, strawberries, peaches, grapes, kiwis, dates) are in high demand. Fresh fruit is often consumed directly as dessert or as fresh fruit juice.

Busy lifestyles and urbanization have led to an increase in the popularity of convenient, ready-to-eat fruit products. People often buy fruit from wet markets, convenience stores, and supermarkets (Figure

1). Approximately 90 percent of households in Burma still depend on the wet market; however, buying habits in urban areas have changed in recent years to a greater preference for supermarkets and convenience stores. The number of supermarkets and convenience stores has rapidly expanded in the three years since the COVID pandemic as the urban population enjoys shopping in stores with air-conditioning, nice displays, and comparable prices to wet markets for imported fruit. Wet markets remain essential for people outside of major urban areas, as well as for wholesalers. The main wholesale wet markets in Yangon are Thri Mingalar Market and Danyingone, where most fruit importers are based.

Despite the increased demand for fruits and vegetables, consumption in Burma is still well below the recommendations of the World Health Organization (WHO). According to Euromonitor, consumer expenditure on fruits in Burma decreased by 11% in 2021 compared to 2020 following the coup. However, it rebounded to $1.3 billion in 2024, increasing by 14% compared to 2023.

Due to transportation costs and inflation, imported fruits are relatively expensive for many consumers in Burma. Upper- and middle-income people in large cities are the typical target consumer group for imported fruits. Following a post-COVID trend of increased health and wellness focus among these consumers, there has been a rise in demand for organic and imported fruits, such as cherries, blueberries, blackberries, raspberries, kiwis, and apples. These fruits are also popular among children in upper income families.

Figure 1. Fruit Selling Points in Burma

Supermarket/ Hypermarket

Facebook page, e-commerce sites/ apps

Wholesale market

Wet market

III. Trade

(a) Imports

Burma's fruit importation primarily relies on border trade with neighboring countries, especially China and Thailand. The Muse-Ruili border crossing serves as the main channel for fruit imports from China, while overland routes through Myawaddy, Tachileik, and Maw Taung facilitate the importation of fruits from Thailand. In addition to land routes, maritime shipments via the Ranong–Kawthaung–Yangon route, passing through Laem Chabang Port, also contribute to the country's fruit importation. On a smaller scale, air shipments from Thailand, Malaysia, and Singapore further supplement Burma's fruit supply. These various import channels collectively ensure a steady flow of produce into the country.

In 2019, prior to the COVID-19 pandemic and the military coup, Burma's fruit imports totaled $225 million a year. By 2024, this figure had shrunk by 88.9 percent to $25 million. Imported fruit value shrunk by 13.9 percent in 2024 from 2023, and the volume fell by 38 percent. The regime has imposed stringent regulations on the issuance of new import licenses for specific products through border checkpoints. Importers report that utilizing border crossings in conflict-affected areas carries significant risks. Additionally, importers have to pay taxes, import duties, and fees to the respective armed groups (on top of fees collected by the regime), while also closely monitoring for periods when the border gates are open.

The United States was the fifth highest fresh fruit supplier to Burma in 2022, the latest year when direct shipments from the United States were possible (Table 2). At that time, apples, oranges, cherries, and grapes were the top selling fruits in the market. However, even since direct importation seized (after the coup and amid complex importation procedures), U.S. fresh fruits have entered Burma by road and air through the border with Thailand. According to premium fruit importers in Burma, consumer interest in U.S. fresh fruits has continued to increase from 2021 to 2024 due to the products' quality reputation, premium size and appearance, and consistency compared to local varieties. Popular imports include

apples, pears, mangoes, oranges, strawberries, and grapefruit. Burma does not produce kiwis, cherries, blueberries, blackberries, and cranberries and entirely relies on imports to meet the demand for these fruits.

In 2024, Thailand supplied 65 percent or $16 million of Burma's fruit imports (Table 2). China's share shrunk to $8 million (67 percent drop by volume from 2023) or 35 percent of total fruit imports in 2024 due to border closures and civil unrest. Burma's fruit imports continue to encounter significant challenges when compared to their levels prior to the COVID-19 pandemic and the military coup, reaching only a fraction of their previous levels. These challenges are primarily due to ongoing conflicts and transportation difficulties, which severely disrupted traditional import channels. Still, imports of fresh fruits through Thailand — including U.S. apples, grapes, strawberries, and cherries — have now surpassed their pre-COVID 2019 levels. This growth highlights the concerted efforts to meet local demand for imported fruits despite prevailing challenges.

Table 2. Fresh Fruit Exports to Burma by Country (2019-2024)

Calendar Year (Value: $)

Country	2019	2020	2021	2022	2023	2024	Percentage of Change from 2023 to 2024	Percentage of Change from 2019 (pre-COVID and coup) to 2024
Thailand	7,751,192	10,852,160	18,483,247	16,779,310	14,305,926	16,154,937	13%	108%
China	213,249,855	246,226,276	114,031,322	23,540,580	45,488,244	8,729,821	-81%	-96%
Singapore	23,484	11,647	8,893	44,775	23,089	2,975	-87%	-87%
Malaysia	942	31,055	33,404	14,654	14,654	691	-95%	-27%
South Africa	944,288	453,420	253,968	210,805	0	0	-	-
India	41,774	105,913	21	162,242	20,059	0	-	-
United States	995,365	554,691	141,878	154,894	0	0	-	-
New Zealand	653,847	514,507	115,676	103,250	0	0	-	-
Australia	563,506	331,536	98,862	65,306	0	0	-	-
EU	114,398	207,835	79,661	63,104	0	0	-	-
Israel	29,000	68,000	-	5,000	0	0	-	-
South Korea	124,874	95,724	7,734	1,260	0	0	-	-
Total	224,594,519	259,487,057	133,282,418	41,145,181	59,837,318	24,902,768	-58%	-89%

Source: Trade Data Monitor

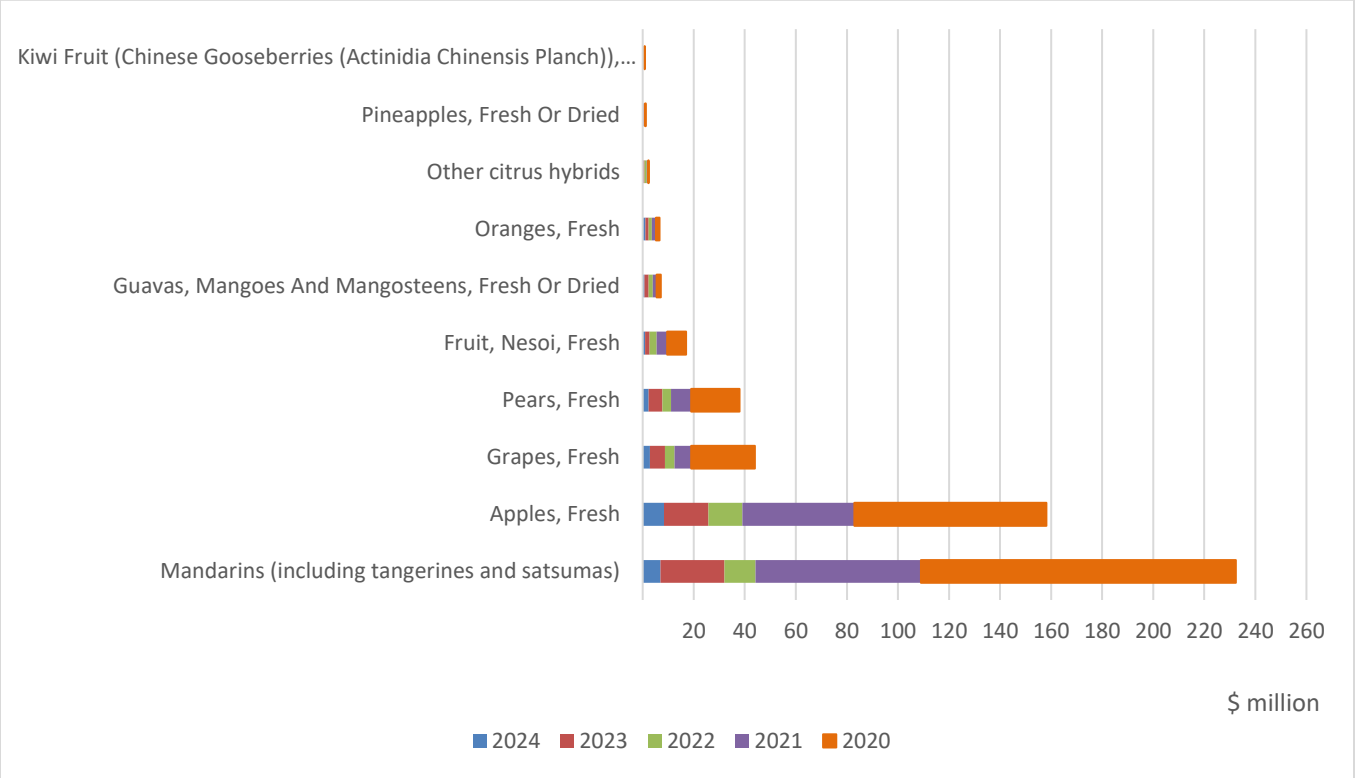
Since the 2021 coup, most shipments have increasingly relied on border trade, making it difficult to accurately identify the country of origin in import data. The following percentages offer the best approximation of fruit import origins based on 2022 import records.

Table 3. Types of Fruits and Imported Countries Based on 2022 Importation Data

Fruits	Imported from	Percentage of import	Grand Total ($)
Apples	China Thailand New Zealand **U.S.** EU Singapore	67.6% 30.6% 0.8% **0.6%** 0.5% 0.1%	13,546,578
Mandarins	China Thailand South Africa	81.4% 18.4% 0.1%	12,192,154
Grapes	China Thailand **U.S.** India Australia South Africa	54.5% 43% **0.9%** 0.7% 0.6% 0.3%	3,881,948
Pears	China Thailand Singapore	68.3% 31.6% 0.1%	3,295,212
Guavas, mangoes and mangosteens	Thailand India	92.7% 7.3%	1,833,485
Oranges	Thailand South Africa **U.S.** Singapore	82.3% 12.4% **3%** 2.2.%	1,457,619
Peaches	Thailand Australia	85.7% 14.3%	150,464
Cherries, fresh, other than sour	**Thailand (most are U.S. origin, % not available)** Australia	**72.4%** 27.6%	80,658
Durians	Thailand Malaysia	63.7% 36.3%	40,343
Grapefruit and pomelos	Thailand Israel	78.2% 21.8%	22,932
Persimmons	China Thailand	93.1% 6.9%	14,620

Source: Trade Data Monitor

Figure 2. Fresh Fruit Exports (2020-2024) to Burma from the Top 10 2022 Suppliers



Source: Trade Data Monitor

(b) Exports

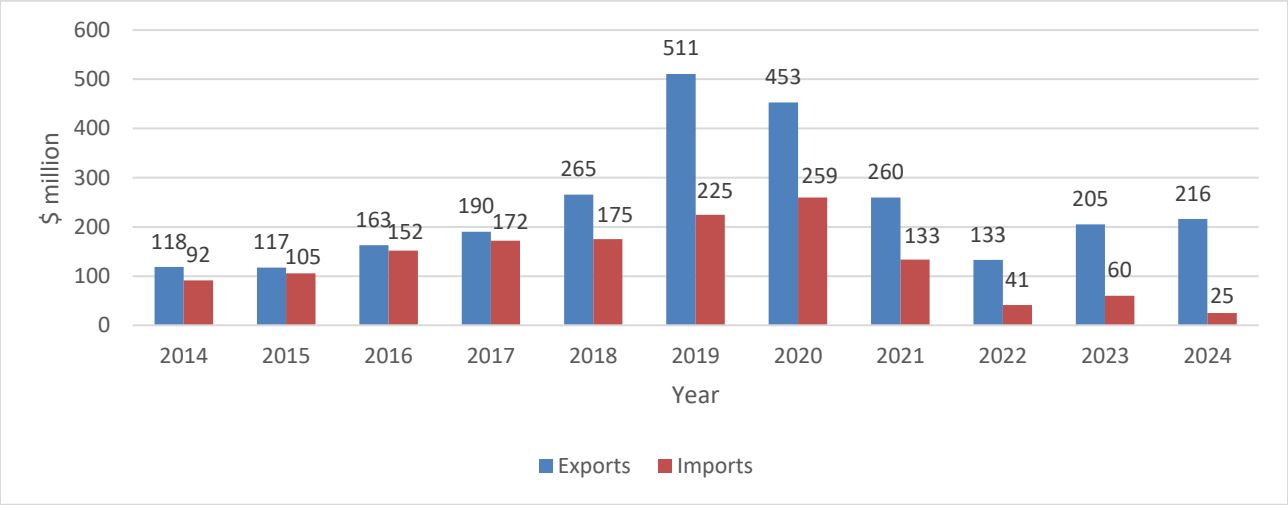
China was the destination for 96 percent of Burma's total fruit exports in 2024. In the late 2000s, Burma's fresh fruit exports to China grew significantly. The next largest markets in 2024 included Thailand, Pakistan, Bangladesh, Malaysia, Singapore, Indonesia, and Bulgaria.

In 2019, prior to the COVID-19 pandemic and the military coup, Burma's total fruit exports reached $511 million (Figure 3). By 2024, exports decreased to $216 million a year, reflecting a 57.7 percent decline. This figure also represents a 5 percent increase compared to 2023 exports, following a pattern of slow recovery since 2022. The military regime is actively promoting exports to bolster its foreign currency earnings, with a particular focus on increasing trade with China. In 2023, the Muse border gate, which accounts for the majority of cross-border trade with China, witnessed the daily export of approximately 70 truckloads of fruit. Per approval of China's General Administration of Customs (GACC), these exports included watermelons, cantaloupe, mango, mangosteen, rambutan, longan, lychee, plum, and banana. Watermelons are particularly reliant on the Chinese market, with most exports going through the Muse border. These exports, however, are often impacted by the civil unrest in Burma, conflicts and closures at the border, transportation delays, and fluctuating prices, all of which significantly affect the livelihoods of farmers in the region. These constraints have forced some sellers to accept lower prices within Burma instead of exporting at higher rates to China. The top five fruits in

terms of export quantity in 2024 were bananas, watermelons, melons, avocados, and mangoes (Figure 4), primarily cultivated in Burma's central regions, such as Sagaing, Magway, and Mandalay.

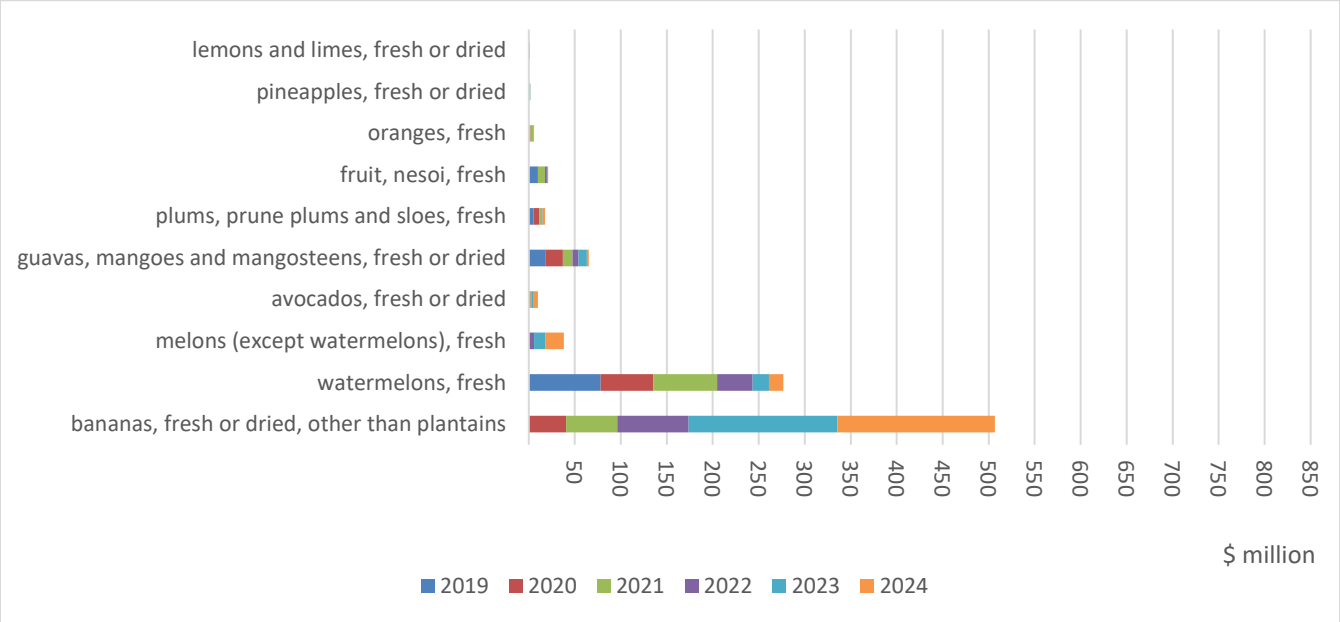
Burma has been actively working to expand its fruit exports to include pomelos, avocados, pineapples, and more. After years of negotiations, China granted approval for Burmese pineapples to enter China through regular trade channels in November 2024.

Figure 3. Burma's Fruit Exports and Imports by Value



Source: Trade Data Monitor

Figure 4. Top Ten Fruits Burma Exports to World



Source: Trade Data Monitor

IV. Opportunities and Challenges for U.S. Fresh Fruits

There is no data on direct fresh fruit imports from the United States in 2023 or 2024. In 2022, fresh fruit represented 3 percent of consumer-oriented U.S. exports to Burma. However, the actual volume of U.S. agricultural products reaching Burma exceeds official statistics due to transshipment through Thailand. Opportunities to replace some of these indirect exports may arise when Burma's political situation improves. Currently, U.S. fruits are competitively preferred by consumers in the Burmese market due to their superior quality and larger appearance compared to the local varieties. Furthermore, U.S. fruits in the market benefit from a superior taste, longer shelf life, U.S. regulations and enforcement of food safety standards, and robust branding and marketing support from U.S. cooperators to importers.

Opportunities	Challenges
Fruits not grown in Burma have been allowed for import from border areas. Consistent tariff rates on fresh fruits since 2022 (Table 4). Despite their price point, imported fruits are in demand because their availability complements the availability of domestically produced temperate fruits.	The imported fruits' price has tripled compared to prices in 2019 due to the depreciation of the Burmese kyat. The distance between the United States and Asia contributes to higher costs. Consumers have become more price sensitive after Burmese kyat depreciation. Price competitiveness and logistics of U.S. fruit exports relative to other fruit suppliers to Burma.

The most promising market prospects for U.S. fruit suppliers include various varieties of apples, cherries, mandarins, peaches, grapes, oranges, lemons, strawberries, and blueberries. These U.S. fruits have market access to Burma.

Table 4. Burma's Customs Tariffs on Select Edible Fruit Imports

Fruit	Tariff Rate
Citrus fruit, fresh or dried (Oranges, Mandarins, Clementines)	20%
Grapefruit and pomelos, Lemons, Limes	15%
Grapes, fresh or dried	20%
Melons, watermelons, papayas	30%
Apples, pears	20%
Apricots, cherries, peaches (including nectarines), and plums, fresh	15%

Strawberries	30%
Raspberries, blackberries, mulberries and loganberries, Black, white or red currants and gooseberries, Cranberries, bilberries and other fruits of the genus Vaccinium, Kiwifruits	15%
Pomegranate (Punica spp.),	
Preserved fruit and nuts, Peel of citrus fruit or melons	15%

Source: **Myanmar Customs tariff 2022**

Attachments:

No Attachments.