COUNTRY PAPER

MYANMAR
THE DEVELOPMENT OF FREIGHT FORWARDING AND MULTIMODAL TRANSPORTATION IN MYANMAR

1. Introduction

With the support of the Myanmar Government and the initiative of the Ministry of Transport, Myanmar started to introduce Country Level Workshop on Training for Senior Officials on Freight Forwarding under the sponsorship of UN/ESCAP on 1-5 July, 1996 in Yangon, Myanmar.

Although the freight forwarding industry is a new business activity, the Myanmar Ministry of Transport conceived that this industry should be according to the consolidated and promoted Myanmar Economic Policy and in line with the ASEAN Framework Agreement on the Facilitation of Goods in Transit, signed by Myanmar in the Sixth ASEAN Summit held in Hanoi, 15-16 December 1998.

With the intensity in the regionalization and globalization processes and growing integration and cooperation in the greater Mekong Sub-Region, Myanmar is on the threshold of engaging herself in the movement of goods and to growing trade volume in huge ASEAN market of 500 million people.

Myanmar, being an emerging economy and one of the new entrants to the ASEAN, is in the process of institutionalization, hence, freight forwarding has come to hold an important role in respect of rapidly building, especially at a point of time like this, when Myanmar has raced trade promotion at the top of the development strategies.

2. Country Profile

2.1 The Land and Area

The Union of Myanmar is the official name and Capital is Yangon. Myanmar is the largest country on the mainland South East Asia Region with a total land area of 676.577 sq.km (261,228 sq.mile ).

China borders Myanmar on the North and East, Laos and Thailand border on the South-East, the Andaman Sea is on the South, and the Bay of Bengal, Bangladesh, and India are on the North-West. It has a long coastline which stretches 2,832 km in length.

2.2 Country Economy

Myanmar introduced the more liberalized economic system based on the Market Oriented Economy in 1988-89 and to gain this economic system, Myanmar adopted four economic policies as follow:
(a) Development of Agriculture as the base and all-round development of other sectors of the economy as well.
(b) Proper evolution of the market-oriented economic system.
(c) Development of the economy inviting participation in terms of technical know-how and investment from sources inside the country and abroad.
(d) The initiative to shape the national economy must be kept in the hands of the State and the national peoples.

The main export items include rice, pulses, bean, forest products, fishery products, metals and minerals, precious stones and pearls amongst others and import items including machinery, transportation equipment, chemicals, construction materials and food products.

Myanmar also encourages the development of industries sector of agricultural processing, textiles and foot ware, wood and wood products, petroleum refining, mining of copper, tin, tungsten, iron, construction materials, pharmaceuticals and fertilizer etc.

Myanmar is well-known to be a rich country for petroleum, timber (world's largest stand of hard wood trees), tin, antimony, zinc, copper, tungsten, lead, coal, marble, limestone, precious stones and natural gas.

Foreign Trade

Myanmar adopts an Independent Foreign Trade Policy and believes in trade liberalization and also wants free and fair trade.

Myanmar has bilateral trade agreements with the Republic of Korea, China, Thailand, Bangladesh, India, Pakistan and Viet Nam in Asia and with seven countries in Eastern Europe. Myanmar foreign trade comprises of seaborne trade with many countries and overland border trade with Bangladesh, India and China.

Major trade partners of export products of Myanmar are China, Singapore, Thailand and India and partners of import products are Japan, China, Thailand, Singapore and Malaysia.

The Transportation System

The transport system which is geared to serve Myanmar's domestic and foreign trade includes roads, railways, inland waterways, coastal and overseas shipping and airways. Railways and airways are reserved for the public sector while other transport services are open to both public and private sectors. However, the Government reserves the right to consider the permission of private sector involvement in the areas reserved for the public sector if it feels that the private sector participation in those areas will serve the interests of the nation.

2.4.1 Port of Yangon

Port of Yangon is the major port of Myanmar, situated on the Yangon River 32 km inland from the sea. There are 13 berths available for sea going vessels. 11 berths are allocated for conventional cargo and 3 berths for containers. Port of Yangon is handling virtually all imports
to Myanmar and about 90% of exports to overseas.

**Container Freight Station of Yangon Port**

Containerization in Myanmar was introduced in the Port of Yangon in August 1990 and container terminal covers an area of 15 acres and having 606 ground slots with a stacking capacity of 1515 TEUs. In this meantime, 3 container vessels can be berthed with an overall length of 411 metres.

**Thilawa Port**

To handle the medium term port traffic of Myanmar, port development at Thilawa, a site on the East Bank of Yangon River and 16 km downstream of existing Yangon Port, has long been identified as the most suitable location, based on feasibility studies.

The site has 816 hectares of land and could accommodate 17 berths with each 200 metre long to handle containerized cargo, general cargo and break bulk cargo.

**2.4.4 Shipping**

Myanmar Five Star Line (MFSL) is the state owned shipping line which operates coastal and overseas transport services including container service and conventional service with a fleet of 25 vessels.

Myanmar Five Star Line is serving a dedicated container service between Yangon and Singapore, providing a weekly service employing 2 own multipurpose cargo vessels which has a capacity of 383 TEUs each. The service which is operated jointly with Jardine of Singapore was inaugurated in January 1994.

Container service for shipments to and from destinations world-wide is provided with transhipment at Singapore.

Apart from Myanmar Five Star Container Service, the foreign own 3 container lines, namely Lian Huat Container Line, Hub Line and Advance Container Line are providing feeder services to Singapore-Yangon. These 3 container lines were appointed by the Shipping Agency Department of Myanmar Port Authority as their port agent.

**Inland Waterways**

Myanmar has a huge net work of some 5000 km of navigable waterways transport system along its rivers. River transport services is provided by the state-owned inland water transport (IWT) and private operators.
IWT operates passenger-cum-cargo service, ferry service and cargo service with its fleet of 725 vessels. The private operators provide passenger-cum-cargo service and cargo service. The combined river fleet of IWT and private operators consists of nearly 2,400 vessels and barges.

**Airways**

Domestic air transport is served exclusively by the Myanmar's Air Ways, a public enterprise. There are about 37 domestic airfields in the country. With regard to international air service, Myanmar Airways serve only to the neighbouring countries such as Bangkok, Kuala Lumpur, Singapore and Hong Kong, China at present, however, other international airlines such as the Thai Airways International, Biman Airlines, China Airlines and Aeroflot, have their air services via Yangon. Other International Lines, such as KLM; Pan American, Air France, Eva Air, All Nippon Airways, Silk Air, Japan Airlines, Korean Air, Lufthansa German Airlines, Malaysian Airlines, Indian Airlines, Asiana Airlines and Pakistan International Airlines also have their offices in Yangon.

**Highways**

For economic, social and regional development, more transport facilities are made available in the country. In 1995/96 the total mileage of the main road was 30,623 km (19,028 miles), comprising 3,946 km (2,452 miles) of Union High Ways and 19,623km (12,193 miles) of other main roads.

**Rail Transportation**

Myanmar's Railways (MR) operates a metre gauge railways network which comprises of 2391.61 route miles (3827 route km).

All major urban centres are connected by rails, the longest distant being Yangon to Myitkyina which is about 1,162 km (722 miles). Mandalay, the ancient capital and the second largest city of Myanmar is 620 km (385 miles) by rail from Yangon, while Lashio in the north eastern part of the country is about 901 km (560 miles) away. Other major towns, Mawlamyine in the east and Pyay in the middle can also be reached by rail.


3.1 National Trade and Transport Facilitation Committee

To facilitate smooth cargo clearance by sea for import and export goods, the Government formed the Port Facilitation Committee at Yangon Port in 1996-97 and supervises every inbound and outbound containerized cargoes and conventional cargoes promptly through the Customs and Port Clearance.
3.2 Adoption of ISO 9000 standards by the government and national association of freight forwarder

As for the adoption of ISO 9000 standards, although one or two seminar were held on ISO 9000 in recent years in Myanmar, the process has not yet found its way to the level of freight forwarding. In fact, freight forwarding as an industry, is still little known to the business community in Myanmar.

3.3 Establishment of a freight forwarder's association with FIATA member

Under the present situation, with the intensification of the integration and cooperation of the ASEAN in the regionalization process, the establishment of a freight forwarders association with FIATA membership should soon be established. Hopefully, after this Sub-regional seminar the materialization process will be much faster.

3.4 Adherence to international conventions

Myanmar has participated in general international conventions. Very recently one such convention was the ASEAN Framework Agreement on the Facilitation of Goods in Transit in which all the ASEAN leaders came to a commitment through numerous decisions. Myanmar naturally adheres the following conventions also.

- WTO
- CCC Convention
- Harmonized Commodity Description and Coding System

4. Current position with regard to the freight forwarding and multimodal transport industry

4.1 Cargo Volumes and Routes

In 1996-97, total tonnage of 2,260,403 freight tons, in 1997-98 total 2,569,542 freight tons, in 1998-99 total 2,996,288 freight tons of export and in 1996-97 total tonnage of 5,123,370 freight tons, in 1997-98 total tonnage of 5,756,903 freight tons and in 1998-99 total 4,563,495 freight ton of import were handled at the Port of Yangon for international trade. (Attachment 1).

For sea freight containerized cargo, Singapore is the transit zone of inbound-outbound cargo for Myanmar.

For airfreight cargo, most of the Europe, USA shipments are forwarded via Bangkok and some are via Singapore.
Procedures for import/export and transit traffic

Import Customs Clearance System in Myanmar

Documents require for Import clearance

1. Bill of Lading - first copy - Original
2. Commercial Invoice & Packing List - Original
3. Import license granted by Ministry of Commerce - Original
4. Sale Contract - Original
5. Tele graphic transfer or L/C endorsed by Bank - Original
6. Company Registration Certificate granted by Min. of Commerce - Copy
7. Import/Export Registration Certificate granted by Min. of Commerce - Copy

Import clearance procedures
(Flow Chart attached)

Import Documents with Customs Import Declaration Form (ID) and Valuation Declaration form (CUSDEC 4) are submitted by manually to Customs House Import Registration Section. Customs seen Original Bill of Lading, endorsed and return back to Customs Agent or Owner of Goods.

Original Bill of Lading should be presented to concerning shipping line to issue, container release order, form 90 for loading container to truck at CFS and transport to job site and form 91 for delivery from job site to CFS - Original Bill of lading should be exchanged to delivery order (D/O) at Myanmar shipping agency department (SAD) under control of Myanmar Port Authority. If Bill of Lading is issued by Myanmar Five Star Line, D/O can be exchanged at Myanmar Five Star Line.

As according to the current instruction prescribed by SAD, Authorization letter or General Power signed by Owner of goods, copy of National Registration Card of Person or Agent who is authorized to clear cargo, copy of Company Registration and Import/Export Registration should also attached with BL to exchange for D/O.

Port charges may be paid its, advance at Port Authority in CFS.

Customs House, Import Registration section forward import documents to appraising section and assessment is done by Customs Appraiser. If the invoice value are not acceptable by Customs or value of declare import commodities not shown in Customs record. documents are on forward to Board of Customs Valuation Committee.

When assessment is completed, agent or owner of goods deposit customs duty and commercial tax to Bank for Kyats 5000.00 above. Present Bank Draft / Payment Order to Customs House cash section arid Customs send the import file to Customs in CFS.
Agent or Owner of goods may start to clear the cargo and exchange D/O to Delivery List (D/L) and container Movement Order (MO) at Port Warehouse officer in CFS.

Appraiser of Customs in CFS check again the import documents with D/L and pass to Chief Customs Examination Officer to exam 10% or 100% to the exam examination customs officer.

Physical examination is done in CFS and agent or owner of goods should be Loaded container to truck with MO, deliver to customs exam area.

If everything is found correct to Customs ID, Invoice and Packing List, customs pass and allow to deliver the container from CFS.

Agent or owner of goods to submit the port warehouse officer to allow gate pass from CFS.

Cargo can be delivered to job site or owner warehouse.

4.2.2 Export Customs Clearance System in Myanmar

Documents required for export products from Myanmar

Like other countries, exporters in Myanmar need to submit to the Customs Department before they ship on board to carrier the following documents are required:

1. Company registration certificate granted by Min. of Commerce - Copy
2. Company Import/Export certificate granted by Min. of Commerce - Copy
3. Sale contract between Seller and Buyer for such export commodities - Original
4. Export license or specific export products granted case by case from the Ministry of Commerce - Original
5. Letter of Credit or Tele Graphic Transfer endorsed by Bank - Original
6. Commercial Invoice & Packing List (3) sets - Original

Export Clearance Procedures
(Flow Chart attached)

When the export documents are completed, attached with Customs Export Declaration Form (ED) and submit to Customs House Export Section manually.

Customs Export Section register those documents and pass to Export Appraiser.

Customs Appraiser check the require documents for each export commodities and assessment is done as formality.

After checking the export documents and declaration are correct, export appraiser endorsed on ED for physical examination at Customs in CFS or at Airport. Normally ordered 5% examination on export cargo.
Export section put Customs ED with export documents to envelope, packed and sealed and return back to agent or Shipper if clear by themselves.

While presenting the export permission to Customs House Export Section, Agent or Shipper require to book concerning shipping line or freight forwarder to release containers for their cargo.

**Port Procedures for Export Container**

Shipping lines issue Term and Condition of Agreement between Merchant and Carrier (Booking Note), letter of release empty container from CFS, Export FCL Form 102 prescribed by SAD, Myanmar Port Authority for collection empty container from CFS, Export FCL Form 103 prescribed by SAD for acceptance of loaded container from job site to CFS, Export Container Declaration Form by Shipper and SS Line.

Agent or Shipper should fill up the above necessary form and document with Shipping Instruction of Shipper's requirement as per L/C or Buyer instruction and submit to SAD for allow cargo acceptance to nominated vessel at CFS.

Agent or Shipper can deposit port charges after received endorsement of cargo accept from SAD.

Empty container can be lifted to truck and withdraw by SAD Form 102 from Inland Container Depot (ICD) and deliver to shipper warehouse for stuffing.

After Customs House Export Section allowed export permission, loaded container from shipper warehouse can be delivered to CFS with SAD Form 103 annexed Receipt of Port Charges Bill, copy of Shipping Instruction, Export Container Declaration Form of Shipper and SS Line, copy of Customs Export Declaration form, Shipper made convoy note shown the lay out of cargo stuffing position and Equipment Interchange Receipt issued by ICD.

Agent or Shipper should deliver the loaded container truck to Customs Examination Enclosure in CFS and Customs exam according to the instruction of Customs House Export Section.

When cargo found correct to Customs Declaration Form, Invoice and Packing List Customs allow delivery to ship on board and sealed the container by Customs.

Agent or Shipper should be handed the container with Customs Declaration Form endorsed by examination customs officer in CFS, all export shipping documents of customs file, Boat note issued by Exam Customs to Customs on board to allow cargo ship on board (Customs Preventive Form 35) and Water note to accept cargo on board to Master of Vessel to issue Mate receipt through Supervisor of Port appointed for certain vessel.

Export Customs and Port Clearance is completely done.
Bill of Lading can be requested to shipping line after vessel sailed from Yangon Port.

4.2.3 Transit Traffic

Although this traffic is very rare in practice, but Myanmar allows the transit traffic between Port of Yangon to China transit via Mandalay as well as Thailand.

Transit Traffic Procedures

Transit Agent or Company of Myanmar require to present their Appointment letter of Oversea Company who wish to send their cargo to China via Myanmar as transit. Agent also require to obtain Transit Permit at Min. of Commerce.

Transit agent in Myanmar should be carried out as according to Import Customs Clearance when arrival of goods by sea.

Customs in CFS inspect the container no. with relevant import documents and sealed the container to transport up to the Customs Check point at Border area.

Transit Agent of Company should be reported to the Mandalay Customs check point also to inspect seal condition of container and allow to transport to Border of China.

4.2.4 Relevant National Law and Regulations pertaining to the transport of goods

The Carriers Act of 14, February 1865
The Myanmar Carriage of Goods by Sea Act, 21 September 1925
The Bills of Lading Act, 11 April 1856
The Myanmar Carriage by Air Act, 18 February 1935
The Sea Customs Act of 1878
The Land Customs Act of 1924
The Ports Act
The Yangon Port Act

5. Encountered by the Industry

The freight forwarding industry is a new service industry in Myanmar and the following are some of the problems in the Bill of Lading issued by the freight forwarders of Myanmar.

5.1. Bill of Lading procedures for Import cargo to Myanmar

Myanmar does not accept the Forwarder Bill of Lading (House BL). Myanmar Customs only accept the real consignee’s name on the Shipping Manifest before they can clear the cargo according to the SS Line manifest which is also mentioned on the Bill of Lading. Clearance with the House Bill of Lading is very complicated. Amendments of the Shipping manifest of carrier also have problems in clearance with HBL.
The procedures of House Bill of Lading for import cargo to Myanmar as follow:

Issue House Bill of Lading to Shipper as per L/C or shipper's instruction accordingly.

Ocean Bill of Lading also consign to real consignee address of destination, Myanmar.

-Surrendered the Original Ocean BL to SS Line and request to release the cargo with their HAWB in Myanmar by telex to SS Line in Myanmar. Also request Shipping Line to send telex release not only to SS Line in Myanmar but also to send Shipping Agency Department (SAD) of Myanmar Port Authority.

If the Bill of Lading is issued as per above procedures, consignee in Myanmar can exchange HAWB to D/O as according to the real consignee name on SS Line Manifest and withdraw the cargo at customs with their Import License accordingly.

5.2. Bill of Lading Procedures in Myanmar for Export Sea Freight

Apart from the Myanmar Five Star Line, the other 3 feeder lines should be appointed by the Myanmar Shipping Agency Department as their port agent by the existing regulations. Myanmar Five Star Line have full independence in the issuance of Delivery Order and signing authority for their Ocean Bill of Lading.

As for the other 3 feeder lines, Ocean Bill of Lading should be presented to SAD and all of those O/BL are signed by SAD after shipped on board the cargo and sailed vessel to sea. Forwarders cannot be applied as shipper on Ocean BL of feeder Lines in Yangon, while feeder lines submit their BLs to sign by SAD.

Due to these restrictions, all of the shipping lines are presenting shippers as according to the Export License for their Ocean Bill of Lading of Yangon-Singapore sector to SAD and as for forwarders requirements, NVOCC such as Maersk Line, P&O NedLloyd, Cho Yang Container Line, Hanjing Container Line etc are issuing through Bill of Lading after receiving the Ocean Bill of Lading from feeder lines service.

Freight forwarders in Yangon received the Ocean Bill of Lading of NVOCC and issue their House Bill of Lading as per L/C or Shipper requirements later on.

6. Problem Solution

As for the problem in issuing the Export House Bill of Lading, freight forwarders in Myanmar submit shipping note to shipping line to issue real shippers and the agent overseas as consignee on Ocean Bill of Lading to release the cargo. At the same time, request carrier (NVOCC ) to issue according to the freight forwarder's requirement.

As for the problem of import cargo to Myanmar, freight forwarders in Myanmar instruct their agents in overseas, not to issue freight forwarder in Myanmar as consignee on Ocean Bill of Lading as well as in shipping manifest of shipping lines. Overseas agents should be mentioned real importer of Myanmar as consignee due to Delivery Order purposes and sending agents have to surrender their Ocean BL to concerning shipping lines. Freight forwarders in Myanmar ( Receiving Agent ) also should be instructed to their sending agent to inform shipping
lines or carrier to arrange telex release for the import cargo to real importer of Myanmar.

Conclusion

Majority of the countries being newly emerged market oriented economy are in the process of building national capacities for trade facilitation. There will be challenges of intense competition in trading in terms of freight forwarding, delivery time etc to get a share of the market. To be competitive Myanmar would need to increase its capacity to promote and develop freight forwarding and multi-modal transport industries and examine the prospect for harmonizing the institutional and legal framework relating to multi-modal transport industries among the countries.

Myanmar is by and large endowed with natural resources and also competitive advantages that offer a variety of opportunities. As such, identification of business opportunities in line with the globalization process to gain greater access in the international trade in the context of rapidly expanding freight forwarding and multi-modal transport industries are bound to open new vistas for economic development and cooperation among countries.

As regards freight forwarding and multi-modal transport in the countries, an enabling environment and effective support from economic cooperation of the countries, will add to the pace to the development. The trade facilitation and upgrading of facilities for the promotion of freight forwarding and multi-modal transport will have far reaching effect on the export trend of our country. This altogether means gains from trade that will lead to the export-led growth and development of the country.
MYANMAR PORT AUTHORITY

Statement of Export Tonnage & Import Tonnage

(1989-90 to 1998-99)

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## MYANMAR PORT AUTHORITY

### Statement of Container Cargo Handling (1990-91 to 1998-99)

(20' TEU)

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Flow Chart of Cargo Clearance System of Myanmar
(Import Sea Freight)

Owner of Goods
Or
Agent

Preparation of Import Customs Documentation

SS line
- Present BL to issue Container release Documents from CFS

Shipping Agency Department (SAD)
- Exchange BL to D/O

CFS - Port Authority
- Port Charges Paid
- Exchange D/O to D/L and MO

CFS - Customs
- Customs Appraiser Check against documents with D/L
- Appraiser pass docs to Exam Customs for Physical Examination

CFS - Port Authority
- Shift container to truck with MO
- Present customs pass D/L to CFS Port office and receive CFS gate pass

CFS - Customs
- Exam Cargo as per instruction of Appraiser in CFS
- Customs exam and allow delivery on D/L

Cargo delivery to customer’s warehouse
Flow Chart of Cargo Clearance System of Myanmar
(Export Sea Freight)

Shipper/Exporter
Or
Agent

Preparation of Export Documents

SS Line
- Booking
- Receiving Shipping Docs for release container from ICD and delivery forms to CFS

Customs House
(Export Section)
- Register Export Docs
- Docs checked by Appraiser
- Appraise & Assess
- Export Duty Collect (if any)
- Export Docs sealed into envelope and return back to shipper

Shipping Agency Department
- Endorsement for Cargo Accept to nominated feeder vessel

CFS Port Authority
- Port charges paid for container
- Loading Empty Container in ICD and Transport to Shipper warehouse

Shipper’s Warehouse
- Cargo to Container as per Customs declaration
- Prepare Convoy note for Container layout
- Transport Back to CFS

Container Freight Station

CFS Customs
- Customs Exam 10% or 100%
- Issue Boat note to accept cargo to Customs onboard

CFS Port Authority
- Handed container with customs Export File to Port Supervisor
- Fill up Boat note for Master of vessel to issue Mate Receipt

Ship on Board to Vessel

Attachment 4