

Myanmar

Port Sector Development in Myanmar



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Myanma Port Authority



Outlines



- **Introduction**
- **The Overview of the port development in Myanmar**
- **The Present status of port facilities development and operation policy**
- **Challenges on port facilities supply and operation**
- **Investment Potentialities and Opportunities for the port development**
- **Conclusion**

Port Sector Development in Myanmar



Introduction



General Information about Myanmar

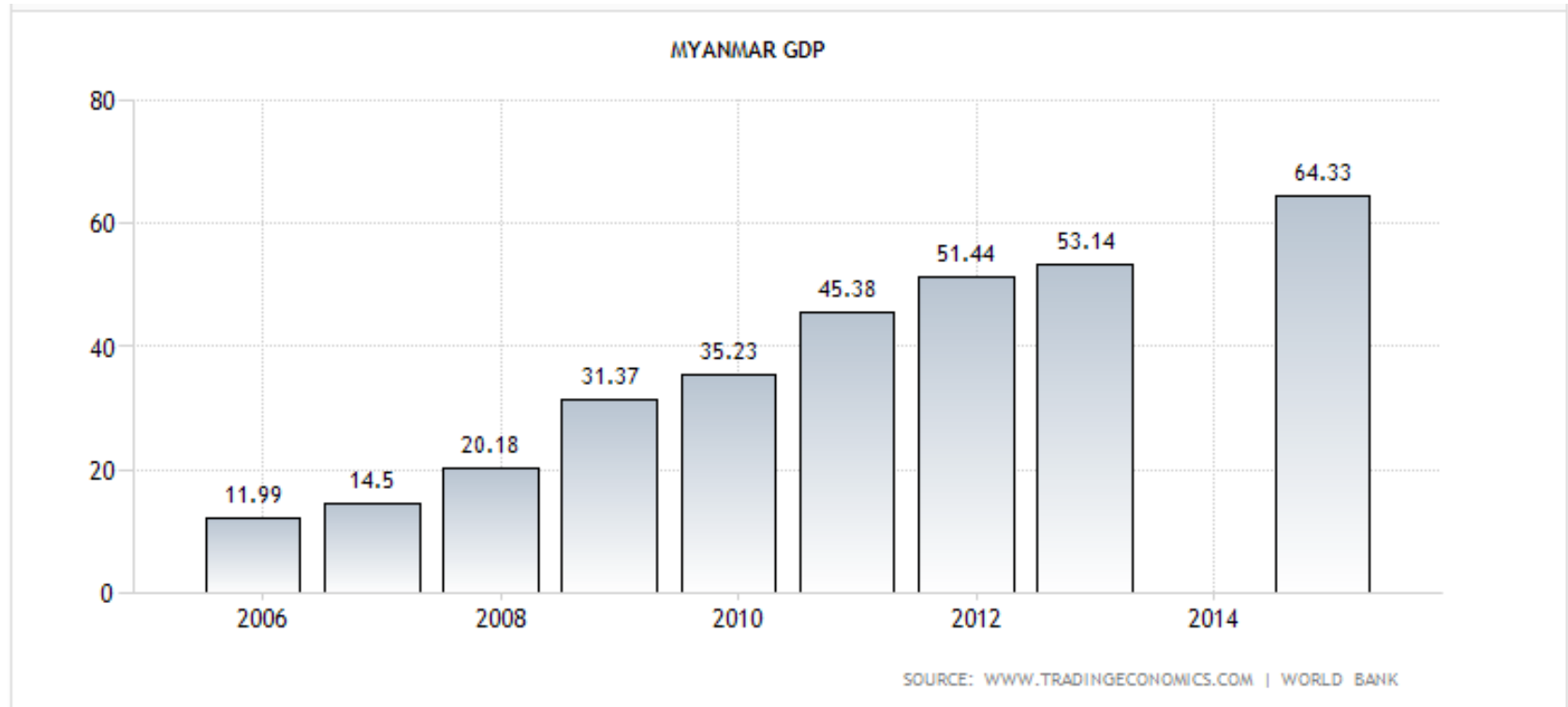
■ Myanmar is situated in Southeast Asia		
■ Total land area	677,000	sq km
■ Total length (South to North)	2,100	km
(East to West)	925	km
■ Total land boundaries	5,867	km
China	2,185	km
Lao	235	km
Thailand	1,800	km
Bangladesh	193	km
India	1,463	km
■ Total length of coastline	2,228	km
■ Population	58	million
■ Capital	Nay Pyi Taw	
■ Language	Myanmar	



Socio-Economic



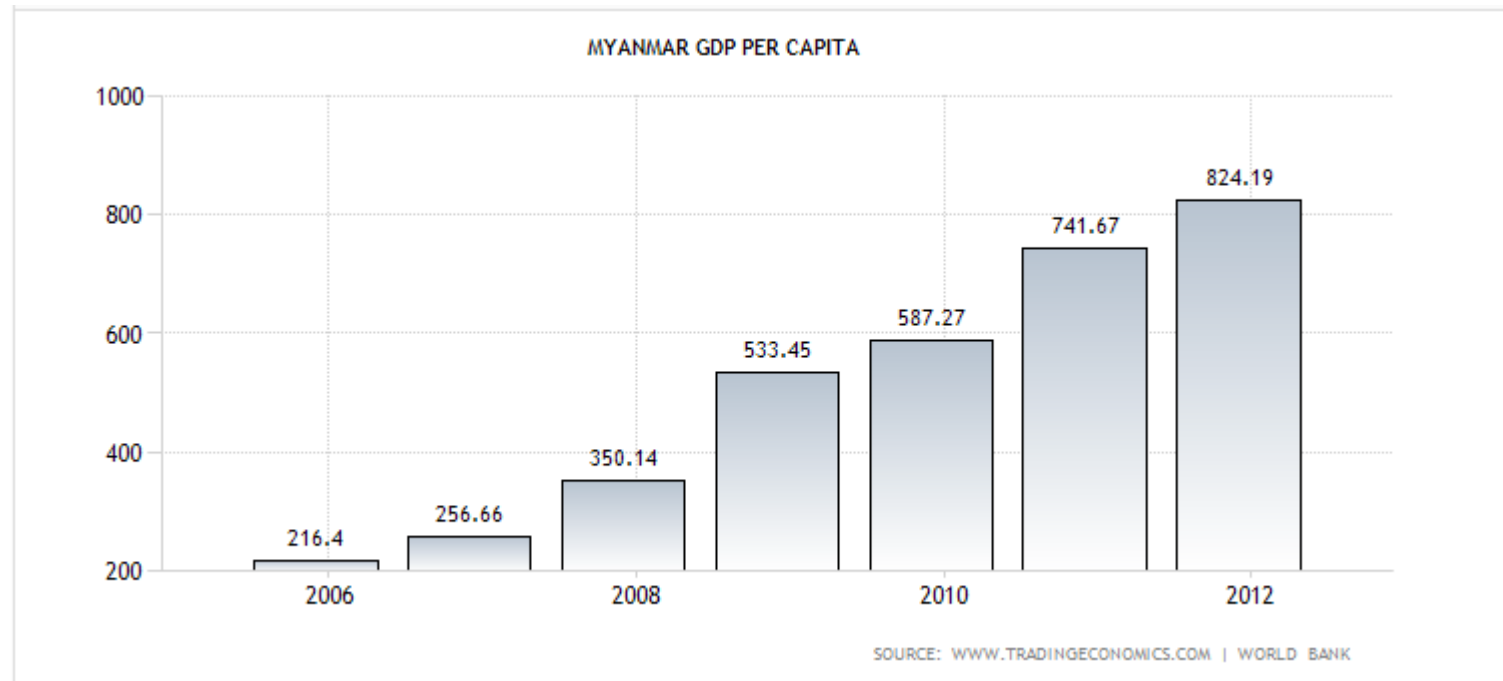
- GDP of Myanmar (in Billion)



Socio-Economic



- GDP per Capita (in USD)



Socio-Economic



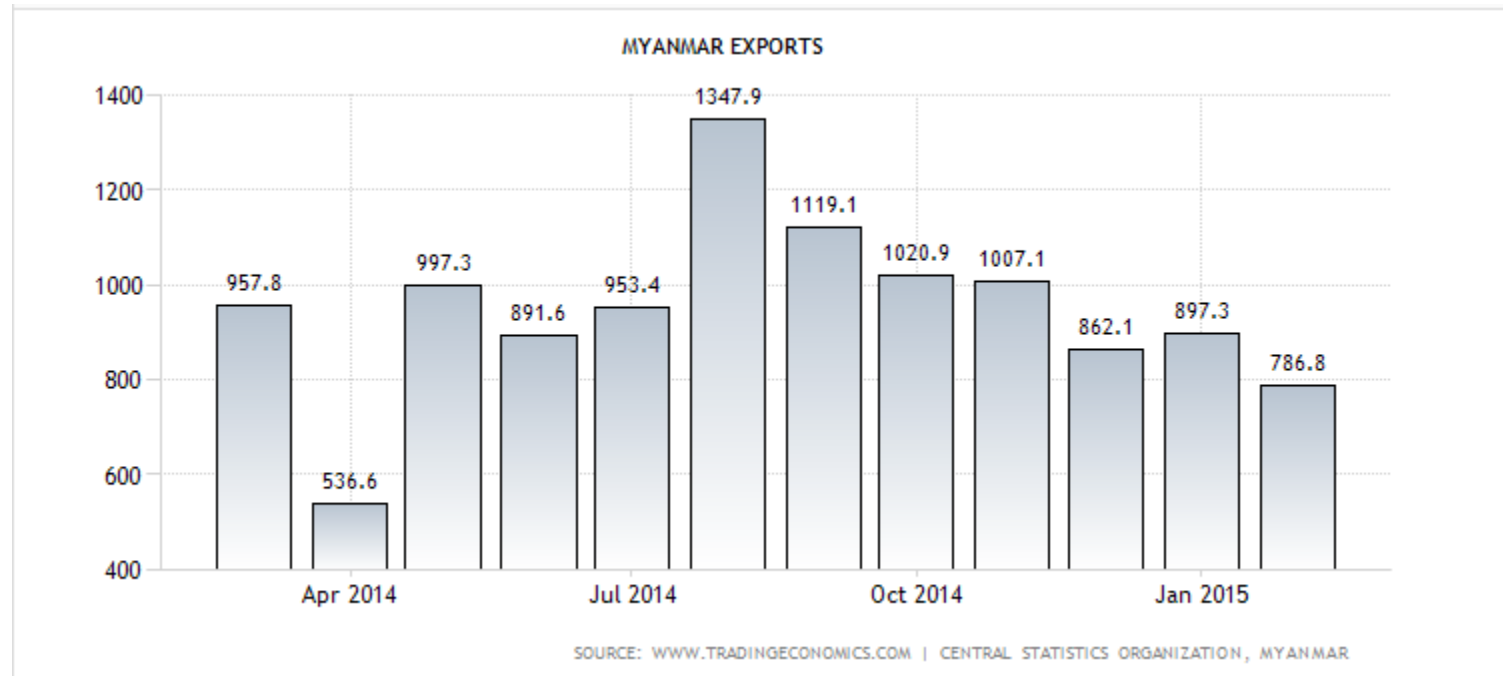
- GDP annual growth rate (in USD)



Socio-Economic



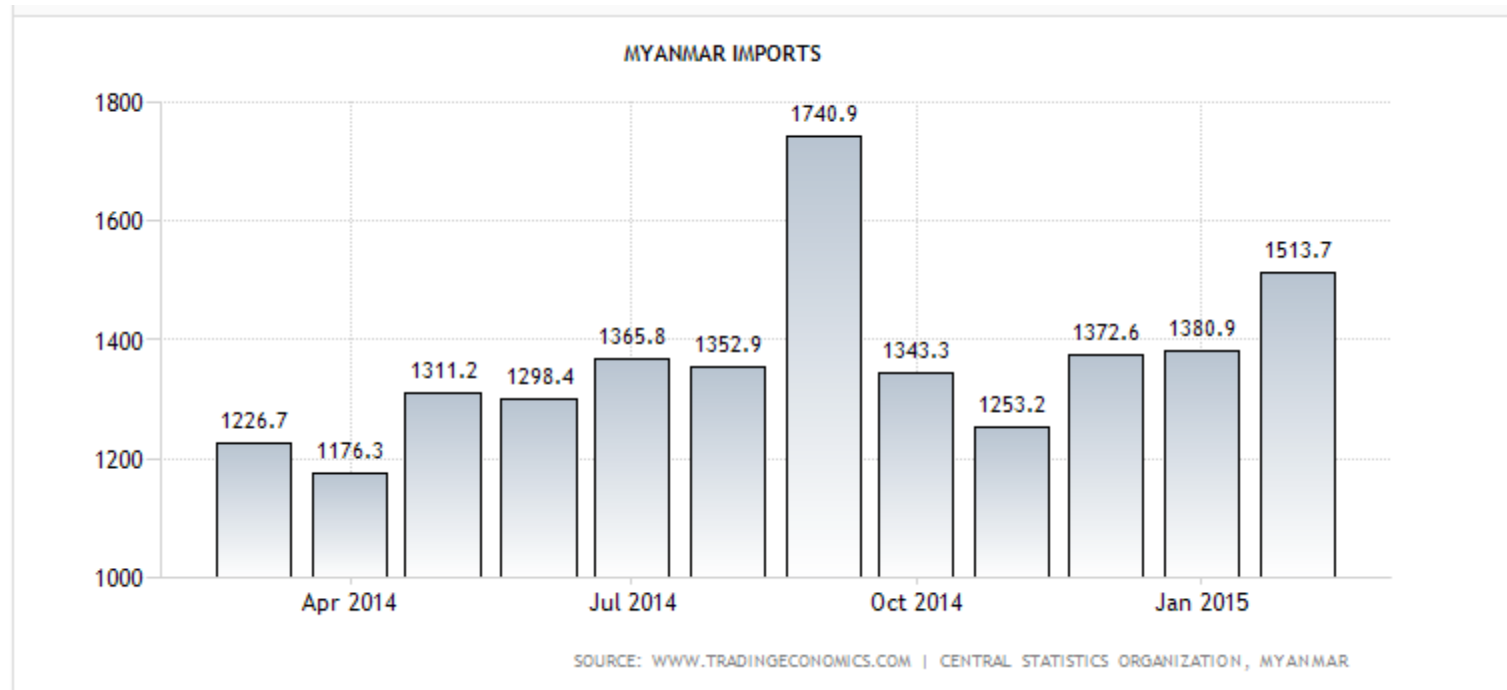
- Export (in USD million)



Socio-Economic



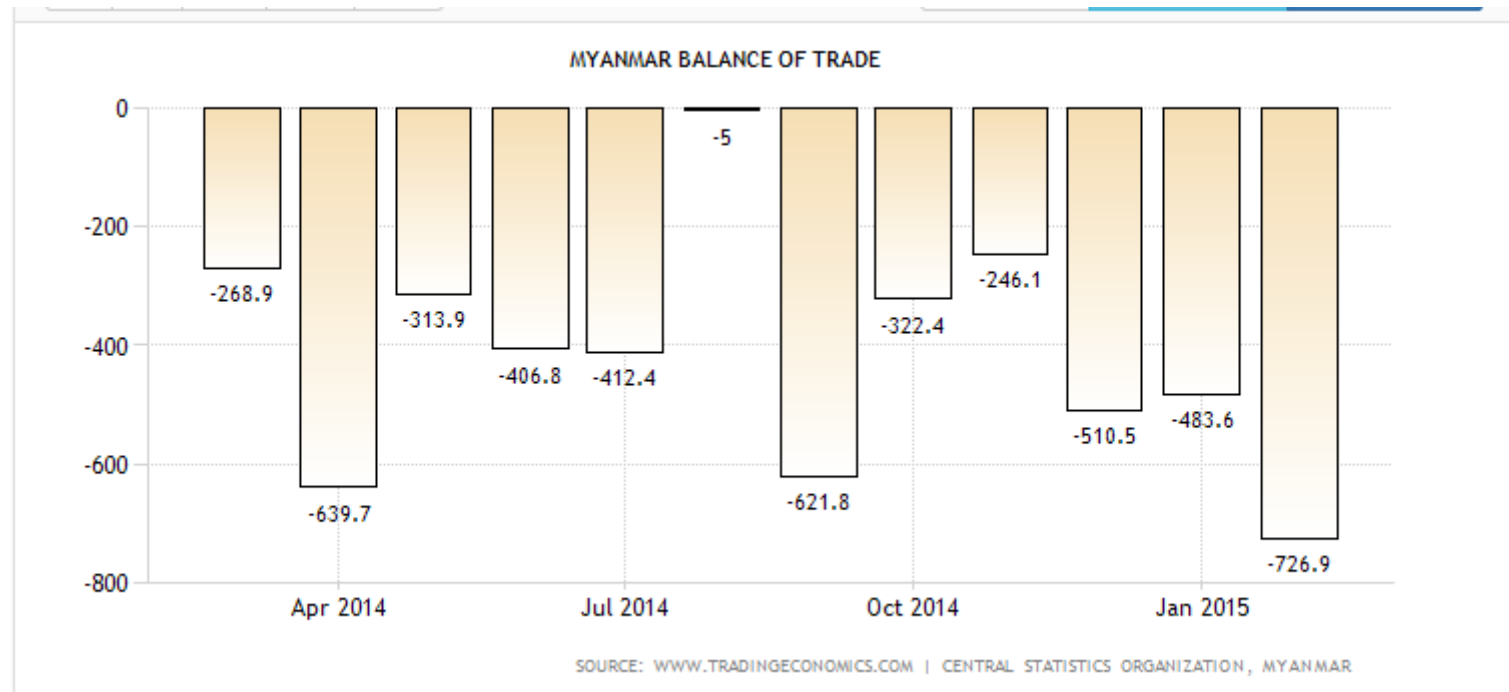
- Import (in USD million)



Socio-Economic



- Balance of Trade (in USD million)



Port Sector Development in Myanmar



The Overview of the port development in Myanmar



History of Yangon Port



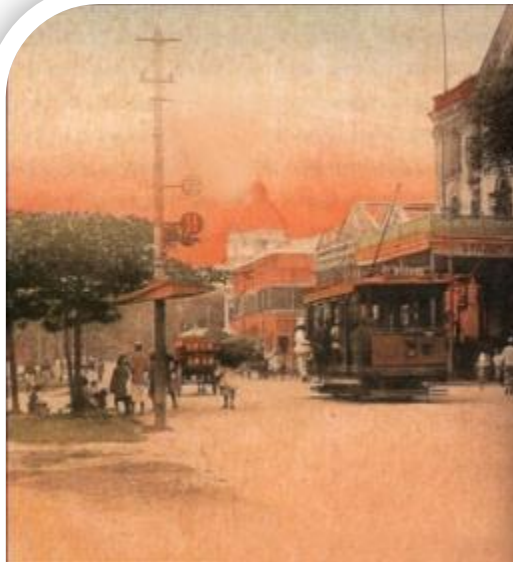
- In 1755, the last Myanmar dynasty “King Alaung Phaya” seized to its territories along the Ayeyarwaddy river and reached to Dagon and changed its name to Yangon.
- Since then Chief Port of Yangon was established by the King for his new kingdom.



History of Yangon Port



- In 1880, the Port was administered by the Commissioners for the Port of Yangon.
- The administration was re-designated as the Board of Management for the Port of Yangon in 1954.



History of Yangon Port



- On 16th March 1972 the Board was organized as Burma Port Corporation.
- The Corporation was reorganized as Myanmar Port Authority which is known today since 31st March 1989.



Roles of Myanmar Port Authority



Ministry of Transport

Governing



Myanmar Port Authority

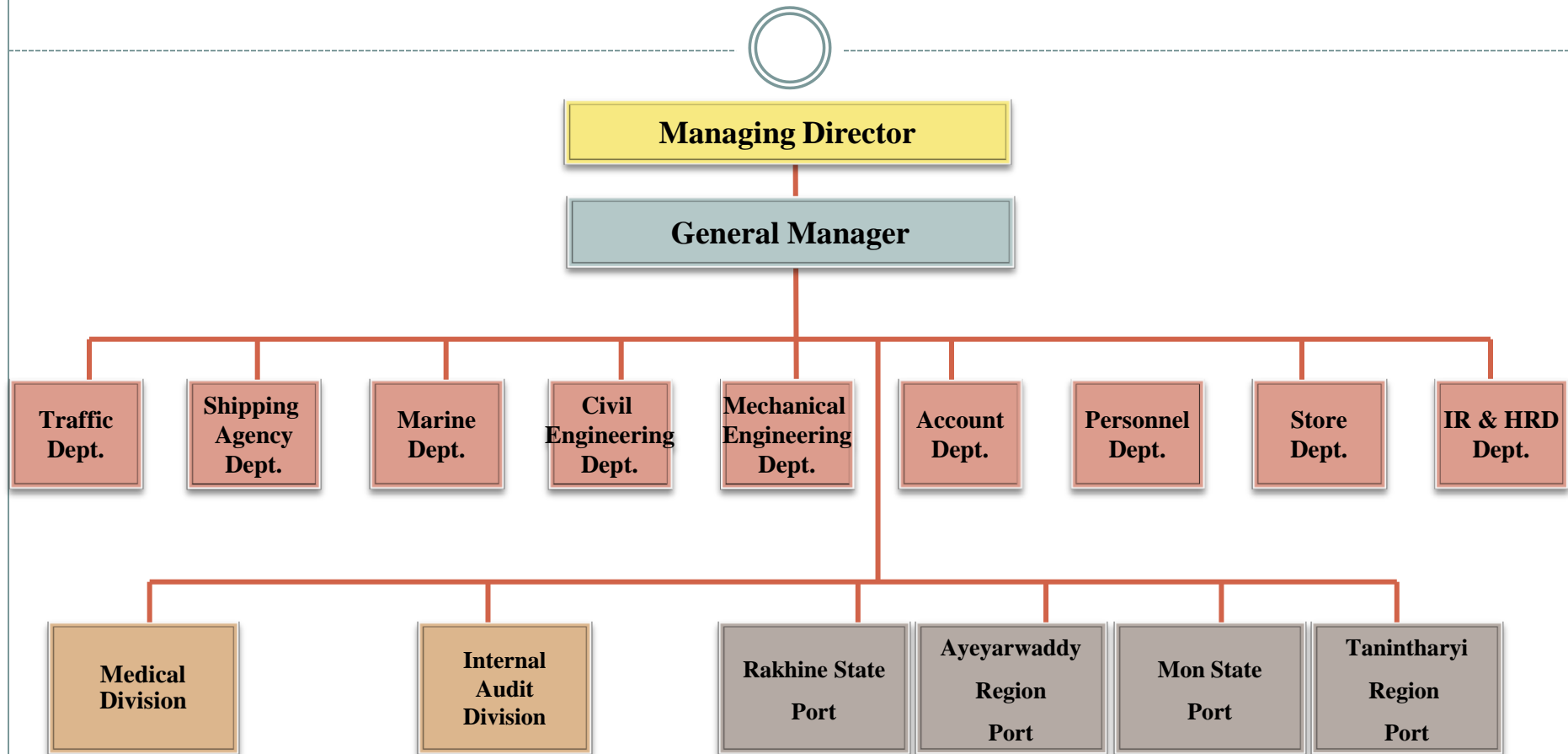
Regulation

Facilitation



- Other Gov. Agencies,
- Public/Private Terminals,
- Shipping Lines,
- Consignees

Organization Structure

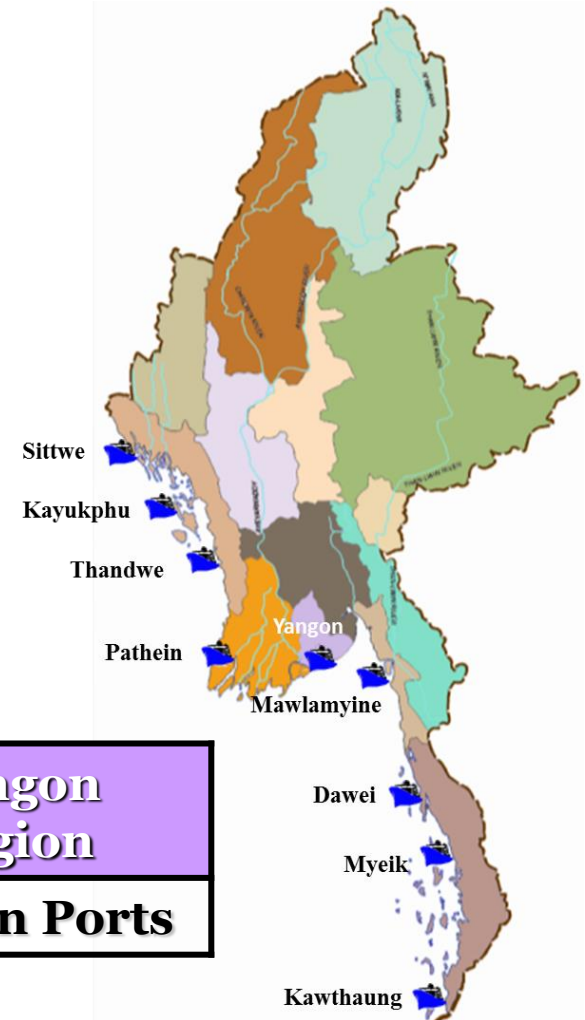


Ports in Myanmar

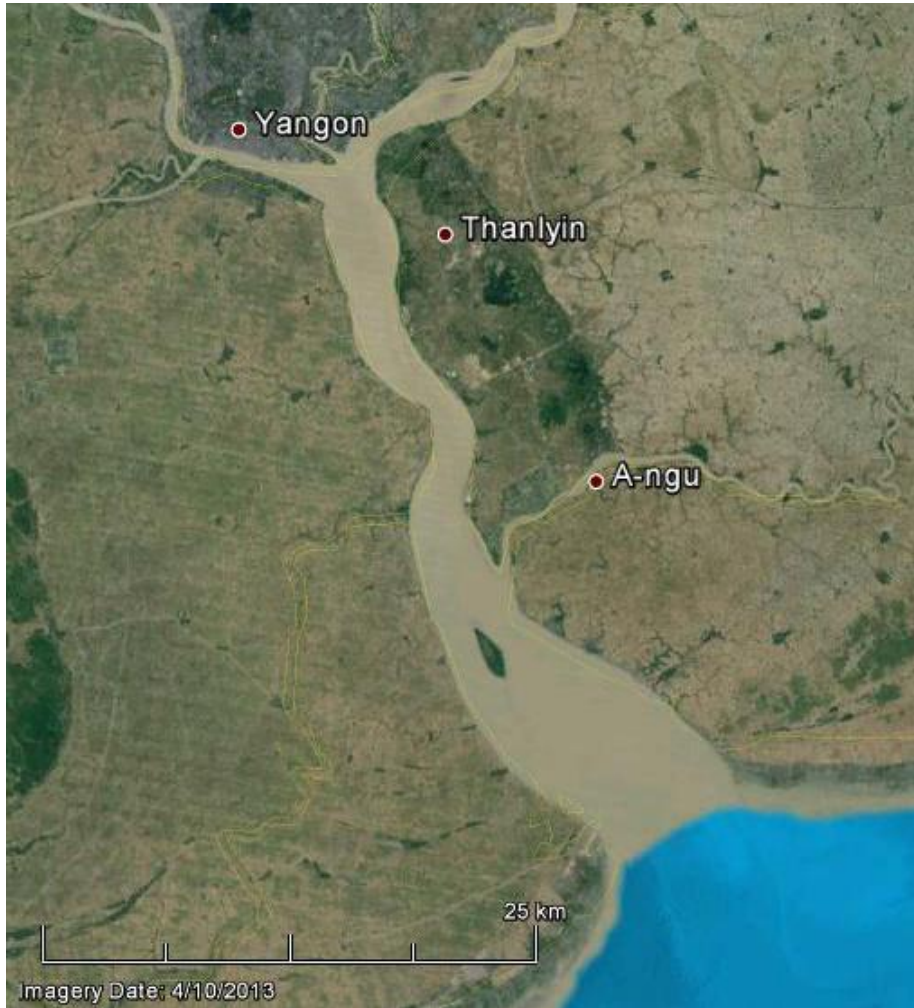


Rakhine State	443 Miles
Sittwe Port	
Kyaukphu Port	
Thandwe Port	
Ayeyarwady Region	272 Miles
Pathein Port	
Mon State	670 Miles
Mawlamyine Port	
Tanintharyi Region	
Kawthaung Port	
Myeik Port	
Dawei Port	

Yangon Region
Yangon Ports



Yangon Port



- The Yangon Port is a river port and premier port of Myanmar
- It is handling about 90% of import and export cargo.

Yangon Port

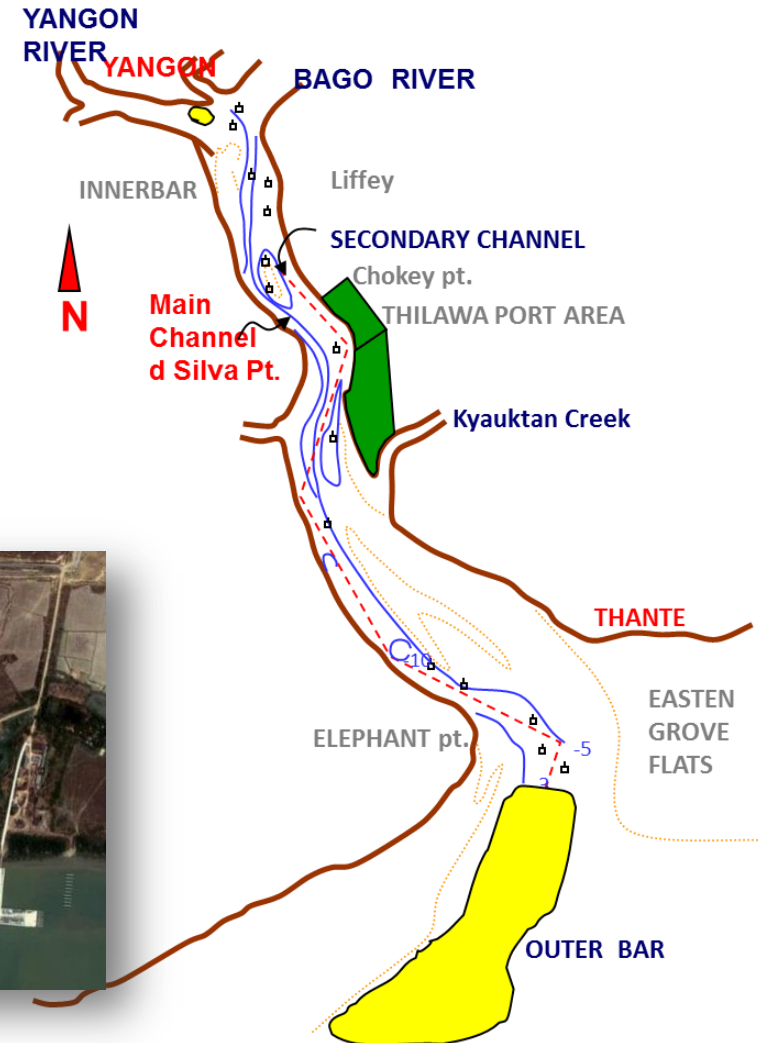


Inner Harbour Area



Yangon Port

Thilawa Area



Yangon Port



International wharves

Yangon Inner Harbour Area - 23 wharves

Thilawa Area - 9 wharves

Total - 32 wharves



Yangon Port Development Scenario



- Port development have been carrying out by inviting local and foreign investment at Yangon Port
- Maritime Transportation served for more than 85 % of the country's exports and imports.
- Yangon Port is the gateway for the maritime trade and vital role for the Economic Development



Yangon Port Development Scenario



- The maritime cargo traffic of the Yangon Port has climbed more than 24 million tons.
- The efficiency in cargo handling of existing terminals has reached up to almost 70%
- More terminals and facilities have been developed within the area of the Yangon and Thilawa area.



Yangon Port Development Scenario



Port Expansion in Thilawa Area



- 37 plots of water front land area were allocated.
- Each plot of land has 15 hectares (37 acres) by measuring uniform quay length of 200m and 750m land ward.
- Recent development of commercial terminals at the Thilawa area are implemented by foreign investors in terms of BOT and JV basic.



Port Expansion in Thilawa Area



1. Developed 10 Plots
2. Under Construction 5 Plots
(GC Terminal)
3. Under Construction $10 \frac{1}{3}$ Plots
(Tanker Berth)
4. Under Construction $5 \frac{2}{3}$ Plots
(Grains Terminal)
5. MPA(ODA Loan) 5 Plots
6. Liquid Bulk Terminal 1 Plots

Port Sector Development in Myanmar



The Present status of port
facilities development and
operation policy



Vision



- “Myanmar Port Authority is the best pillar to build the modern develop nation especially for the maritime trade development with the optimize balance between regulatory and facilitation to the players of the port industry together.”





Missions



- to setup the organization as a State Owned Enterprise (SOE) with the enhancement of the Private-Public Partnership (PPP) in the port industry
- to optimize utilization of the port area and development of the port sector
- to create the good environment for the investors in the port sector
- to monitor and facilitate the terminals players of the all ports of Myanmar
- international relationship is also essential needs
- “as long as water exists, the effort shall be exerted”



Policy



- Myanma Port Authority's Port policy is to develop the port industry in accordance with the national current political and economic policy and also to comply with the international standard.
- To facilitate and regulate the players of the port industry for the development of port industry in Myanmar.

Major port facilities

Yangon River estuary

- Yangon to Thilawa Area - 16 Km
- Yangon to Elephant Point - 32 Km
- Elephant Point to Pilot Station - 32 Km

Tidal Range (The average tidal range)

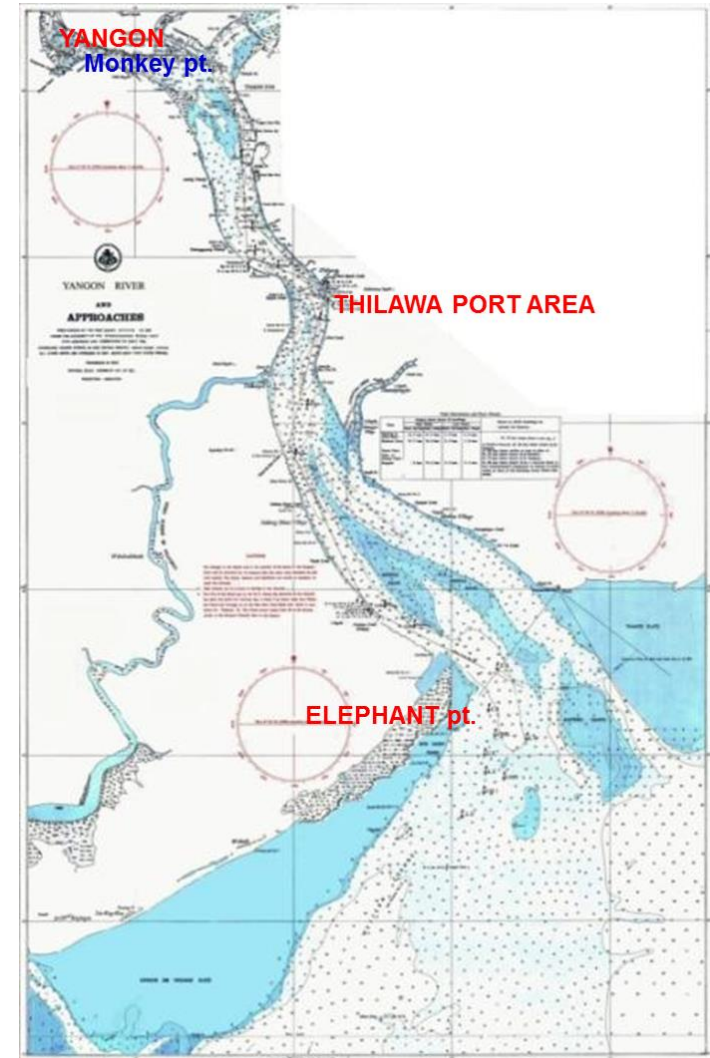
- about 19.3 feet (5.85 m) at spring tide
- about 8.4 feet (2.55 m) at neap tide

Current Velocity

- 4 to 6 knots

Wave

- do not hinder marine operations
- seldom rough with less than (2m) wave-height.



Cargo terminal



No	Name	Type of Terminals	Quay Length (meter)	Apron Width (meter)	Vessel DWT	Back Up Area (acre)
1.	SPW (1)	GC	137	12.2	15000	37.78
2.	SPW (2)		137	12.2	15000	
3.	SPW (3)		137	12.2	15000	
4.	SPW (4)		137	12.2	15000	
5.	SPW (5)		168	15.2	15000	
6.	SPW (6)		162	15.2	15000	
7.	SPW (7)		162	15.2	15000	
8.	BSW (1)	GC/Container	137	15.2	15000	24.37
9.	BSW (2)		137	15.2	15000	
10.	BSW (3)		183	30.0	15000	
11.	AWPT (1)	GC/Container	198	30.5	15000	30.00
12.	AWPT (2)		156	19.5	15000	
13.	AWPT (3)		260	30.5	15000	

Cargo terminal



No	Name	Type of Terminals	Quay Length (meter)	Apron Width (meter)	Vessel DWT	Back Up Area (acre)
14.	MIP (1)	GC/Container	155	18.0	12000	17.36
15.	MIP (2)		155	18.0	12000	
16.	MIP (3)		160	30.0	15000	
17.	MIP (4)		180	30.0	15000	
18.	HOB	Edible Oil	120	15.0	5000	0.88
19.	HPT (2)	GC/Container	213	30.0	15000	
20.	HPT (3)		213	30.0	15000	
21.	AIPT (1)	GC/Container	300	30.0	15000	
22.	AIPT (2)		300	30.0	15000	
23.	Nanthida	Cruise	120	12.0	5000	6.56

Cargo terminal



No	Name	Type of Terminals	Quay Length (meter)	Apron Width (meter)	Vessel DWT	Back Up Area (acre)
24.	MITT (1)	GC/Container	200	30.0	20000	185
25.	MITT (2)		200		20000	
26.	MITT (3)		200		20000	
27.	MITT (4)		200		20000	
28.	MITT (5)		200		20000	
29.	MIPL	GC/Liquid bulk	200	17.0	20000	37
30.	Myat Myiter Mon Services Oil Terminal		133	13.0	15000	24.7
31.	Apex Gas & Oil Public Co., Ltd.		133	15.0	15000	24.7
32.	Green Asia Services Co., Ltd.		133	19.5	15000	24.7

Public and Private Ownership Ratio of Port Facilities



Ownership Ratio (Quay length)



■ Private (82 %)

■ Public (18 %)

Cargo Throughput (GC & Container)



(M.ton in thousand)

No	Year	Import	Export	Total
1	2004-2005	5,208	4,773	9,981
2	2005-2006	5,514	4,725	10,239
3	2006-2007	5,623	5,332	10,955
4	2007-2008	6,240	5,619	11,859
5	2008-2009	6,150	6,166	12,316
6	2009-2010	9,492	6,655	16,147
7	2010-2011	12,307	6,131	18,438
8	2011-2012	14,461	7,261	21,722
9	2012-2013	17,540	6,628	24,168
10	2013-2014	16,967	7,266	24,233

Container Handling Throughput



No	Year	Import	Export	Total TEU	Total (M.T in thousand)
1	2005-2006	86,130	85,775	171,905	2,606.160
2	2006-2007	99,942	97,337	197,279	3,148.045
3	2007-2008	115,267	111,236	226,503	3,462.489
4	2008-2009	133,712	130,294	264,006	3,937.131
5	2009-2010	152,077	151,333	303,410	4,372.025
6	2010-2011	175,315	171,327	346,642	4,571.902
7	2011-2012	207,540	200,503	408,043	5,594.589
8	2012-2013	238,837	239,126	477,963	6,189.673
9	2013-2014	310,822	306,347	617,169	7,636.202
10	2014-2015	369,625	367,811	737,436	9,078.747

Number of Vessels Calling



S.N	F. Year	MPA	MITT	AWPT	MIPL	MIP	MOGE	MPE	HOB	HPT	LPM	Total
1	2004-05	378	119	162	27	64	96	210	31	-	-	1087
2	2005-06	366	113	192	25	98	96	173	39	-	-	1102
3	2006-07	369	127	233	29	91	84	168	52	-	-	1153
4	2007-08	441	163	267	29	68	124	173	28	-	-	1293
5	2008-09	406	172	324	32	84	120	150	1	-	-	1289
6	2009-10	654	214	380	43	93	108	106	-	-	-	1598
7	2010-11	656	267	373	48	139	73	88	31	-	100	1775
8	2011-12	639	245	354	38	137	74	112	89	11	137	1836
9	2012-13	649	239	290	97	181	233	146	76	151	134	2196
10	2013-14	600	309	280	107	216	207	156	90	199	170	2334

Port Sector Development in Myanmar



Challenges on port facilities
supply and operation

River Port



- All vessels calling to the Yangon Port (including Thilawa area) are generally on flood tide.
- Yangon inner harbour is accessible to vessel;
 - 167 m LOA,
 - 9 m draft,
 - 15,000 DWT
- Thilawa area
 - 200 m LOA,
 - 9 m draft,
 - 20,000 DWT.
- The navigation channel needs to be improved.

River Port



- For improvement of Yangon River
 - by mean of dredging and/or constructing of river training structures to be able to access bigger vessels.
 - It needs to conduct the feasibility study on Improvement of Yangon River Access Channel and upgrading the facilities of Yangon Port.

Common Navigation Channel



- No specific and separate navigation channels between International Vessels and Local Ships/Boats



 International Wharves

 Local Jetties

Supply and demand of Port facilities



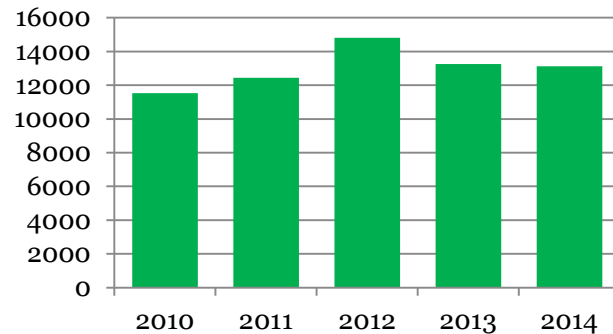
- Container terminals and their facilities

Container Terminal	2010	2011	2012	2013	2014
Number of berth	12	12	14	15	19
Total berth length(m)	2,244	2,244	2,674	2,869	3,714
Total terminal area(m ²)	1,023,212	1,023,212	1,117,392	1,272,772	1,469,241
Total storage area(m ²)	243,309	243,309	2,999,28	419,925	606,881
Total throughput(TEU)/year	334,274	385,591	4,742,02	596,648	721,428
Total number of Quay crane	6	6	8	11	16
Total number of Transfer crane	5	5	9	14	34
Total number of Reach stacker	29	31	32	45	55
Total number of Fork lift	31	39	60	64	82
Total number of Yard tractor	85	100	189	254	277

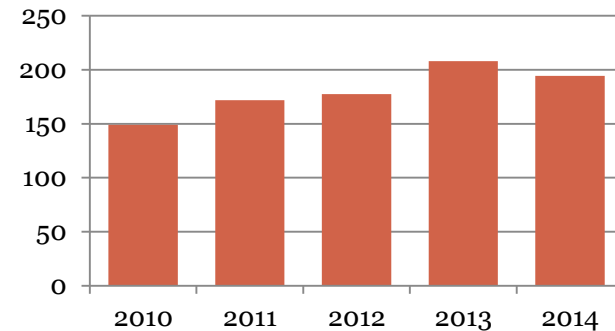
Supply and demand of Port facilities



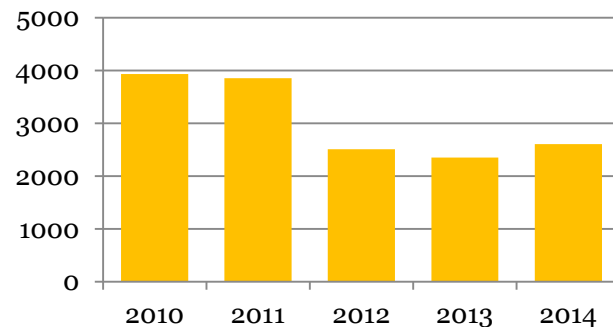
Ratio of TEU/Reach Stacker



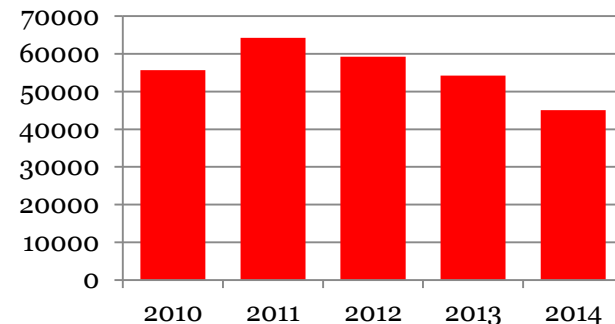
Ratio of TEU/berth length



Ratio of TEU/Yard tractor



Ratio of TEU/Quay crane



Financing for port development



- Private funding with BOT/JV or other
 - ROI and ROA are not much visible
 - Hinterland and market growth are unpredictable at this moment
- International Financial Institutions have not much intention on the development of port sector
- Not much FDI in Manufacturing sector which will be enhance the maritime trade
- Not much Economic Zones and Industrial Zone exposure

Port labourer's supply system



- Initially support from MPA (no standard training school)
- No quality control Stevedore licensing system (no control of quality standard)
- Problems in cargo handling
 - No dedicated training school system at port
 - Less awareness of SHE factors
- Problems in payment of wages
 - Low salary
 - No minimum income regulation

Port Sector Development in Myanmar



Investment Potentialities and Opportunities for the port development

Expansion of facilities supply

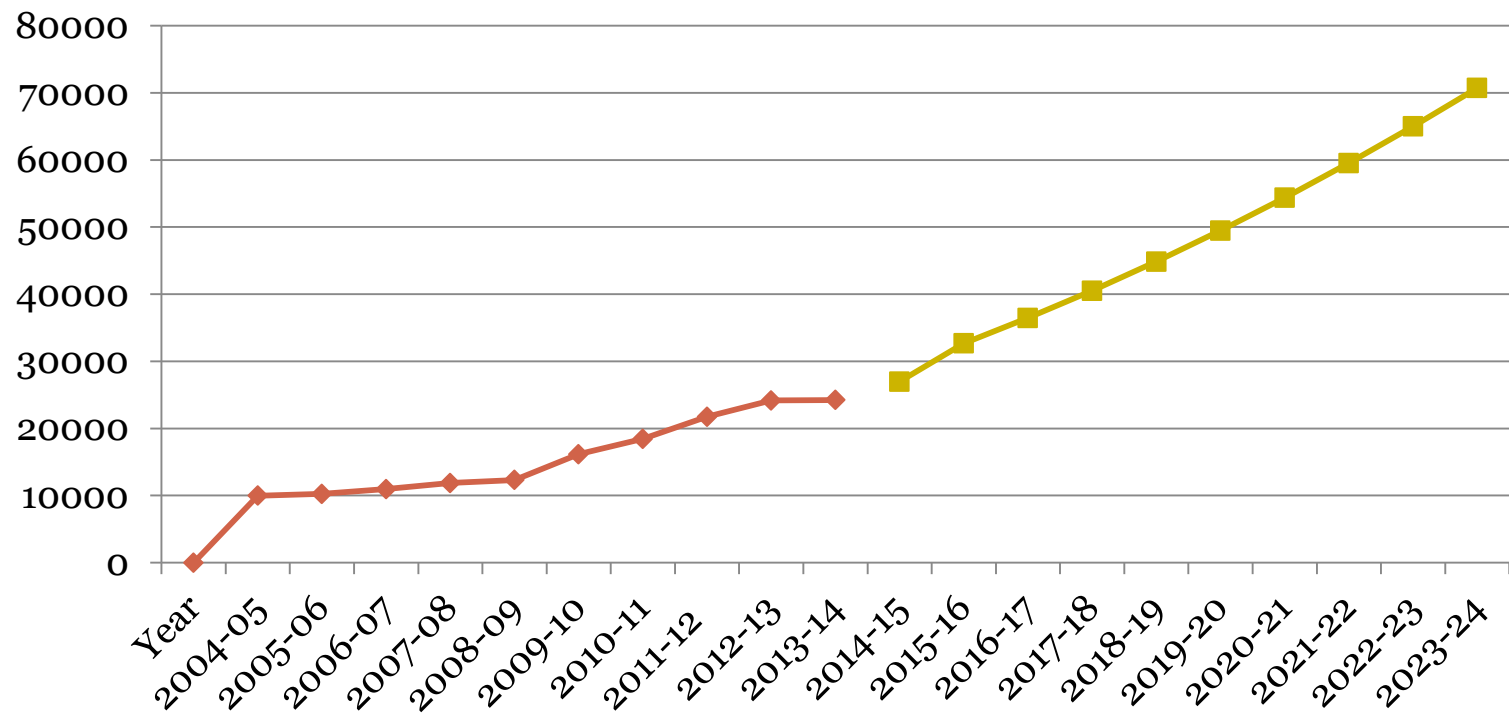


- Closely related with country development
 - Nature of the Maritime trade
 - FDI and Industrial output are also driving forces of the long-term development of port industry
- Setting the target year is also dilemma
 - All the external and internal factors are interrelated each other to set the concrete target for the future

Expansion of facilities supply



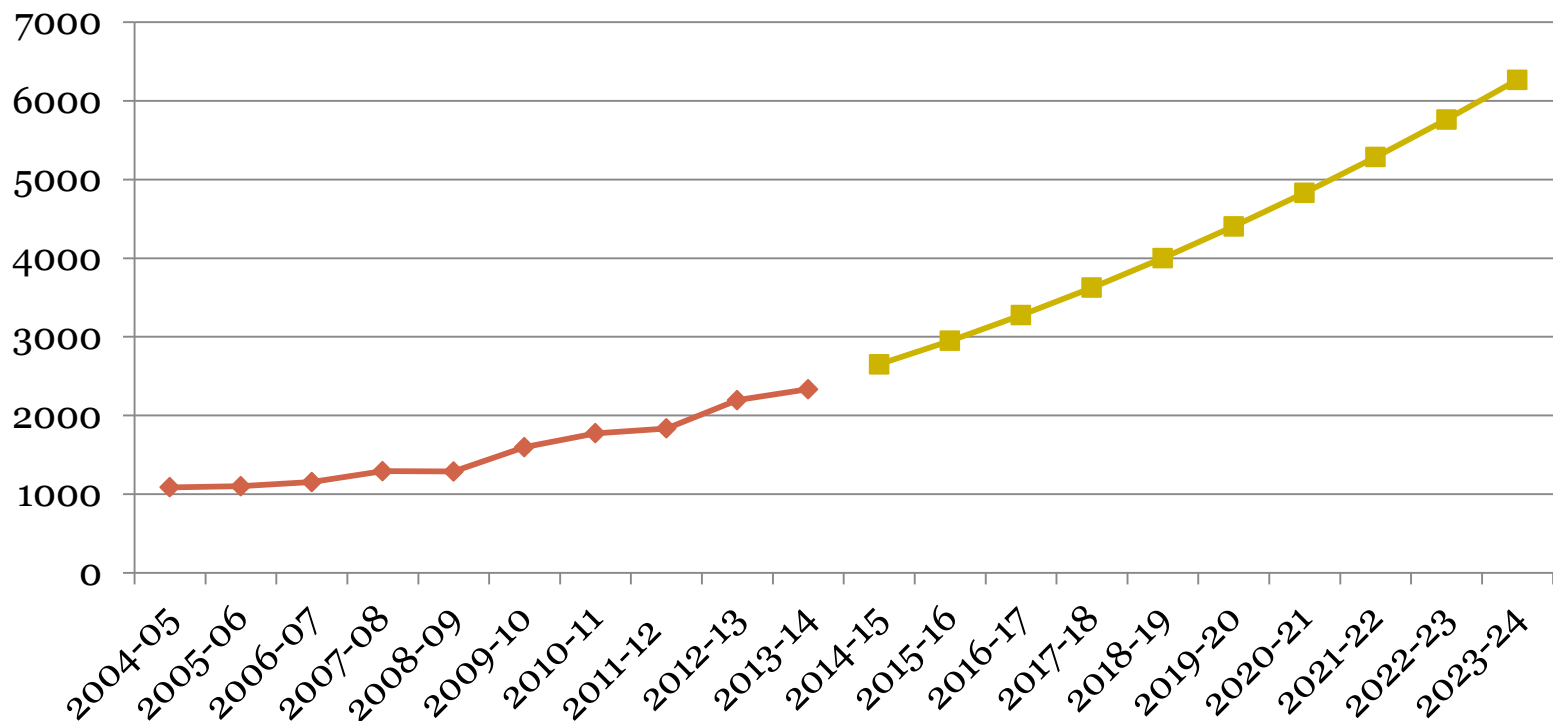
- Prediction of port throughput by year (all cargo)
 - As normal growth, there will be about 70 million ton at 2023-24



Expansion of facilities supply



- Prediction of number of calling vessels (all type of vessel)
 - As normal growth, there will be about 6,000 vessels at 2023-24



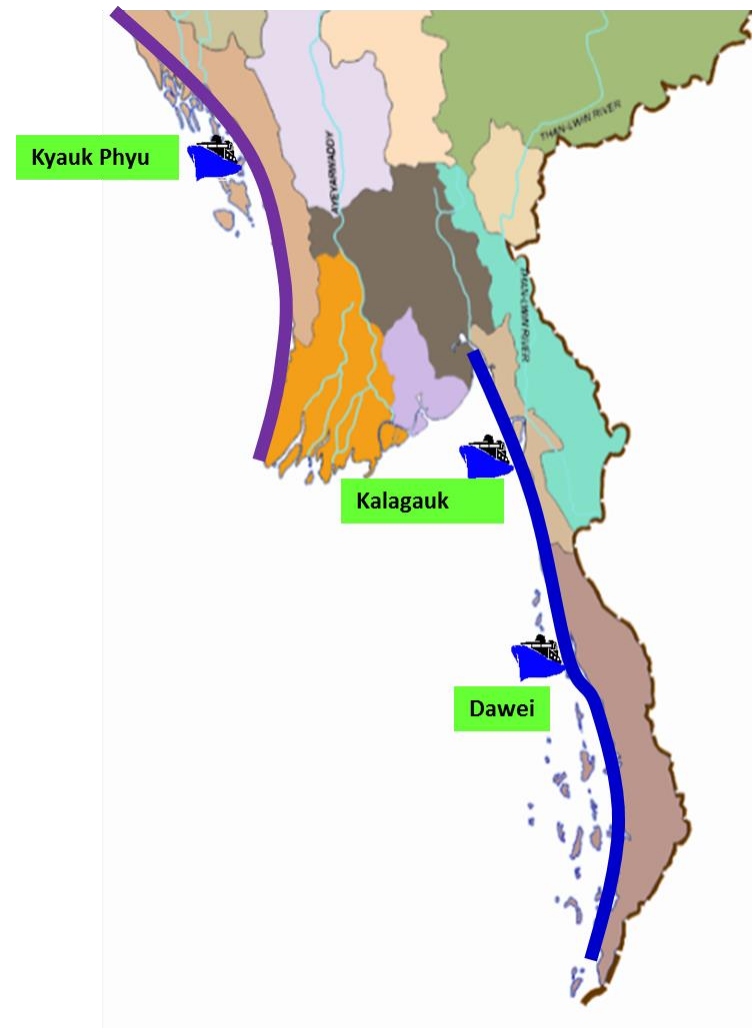
Expansion of facilities supply



- Regarding to the prediction of port capacity requirement
 - It will be directly and indirectly related with economic development of the country
- But, the development of the port facilities has been essential role of the maritime trade
- The feasibility of the possible port development areas has been under studies by various foreign experts, including KOREAN Engineering Team

Potential deep sea port

- Kyaukpyu Deep Sea Port at Rakhine State in the West Coast.
- Kalagauk Deep Sea Port, between Mawlamyine and Ye Region at in the South Coast.
- Dawei Special Economic Zone together with Deep Sea Port at Tanintharyi Region in the South Coast.



Related Transport Facilities



- Expansion scheme for road and railway transport facilitation
 - Dry port development in Myanmar has been carried out as National level
 - ✦ Mandalay (Myit Ngal)
 - ✦ Yangon (Ywarthargyi)
 - Alternative transport mode
 - ✦ High way and express road have been gradually constructed
 - ✦ Rail road strengthening
 - Legal Framework
 - ✦ Multimodal transport law was promulgated in 2014

Financing plan for port development



Possible sources of finance for port development

- Government/ Public
- Encourage of private sector participation (JV or BOT) with reasonable scheme
- International financial institution should be involved
- Financial assistant from outside (eg. Korea, Japan, China and so on)
- Related with other national level development projects (eg. Dawei Special Economic Zone)

Ways of Investment in Port Sector



Option I

- Follow the Myanmar Port Authority's development plan
 - MPA has its own development plan to be inline with National Development Plan
 - Announcement the open tender notice to public
 - Selection of bidding
 - BOT or JV or other relevant scheme
 - Selection process
 - Winner investor can start the development project

Ways of Investment in Port Sector

Option I

- Development Plan



Ways of Investment in Port Sector

Option I

- Tendering



US returns stolen Hanuman monkey god statue to Cambodia

PHNOM PENH, 12 May — The United States on today returned to Cambodia a statue of Hanuman, the monkey god, that was stolen from the Southeast Asian country decades ago. At the hand-over ceremony, Cambodian Deputy Prime Minister Sok An said the statue was taken from the Prasat Chen temple at Koh Ker historic site in Vihear Province, his father brutally severed from the pedestal. It was then transported across the border, shipped to Europe and taken to the

United States.

"Now, after his long journey, he is finally back in his homeland," Sok An said.

The statue, which was acquired by the Cleveland Museum of Art in Ohio in 1982, is a 10th century sandstone sculpture which stands 116 centimeters tall and 54 cm wide and depicts the god, with the body of a man and head of a monkey, in a kneeling position.

The statue was reportedly sold twice in Bangkok — in 1968 and 1972 — before it was taken to the United States.

According to Sok An, the Hanuman will join five other Koh Ker statues recently returned from the United States, including the Duryodhana statue from Sotheby's in New York which decided to settle the case after almost two years of legal battle.

Sok An noted that no single country can fight alone against the illicit trade and transfer of ownership of cultural property, saying that joint international efforts are required in tackling such cases that require complex exercise.

Kong Vireak, director of the National Museum of Cambodia in Phnom Penh, said the statue will be sent to the museum on Wednesday for public display.

He said that since 1996, about 60 statue pieces have been returned to Cambodia from different countries and individuals after they were looted during the civil war that lasted from the late 1960s through 1990s.

Chan Tani, Cambodian secretary of state of the Office of the Council of Ministers, said, "The voluntary return of the Hanuman

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knup135@gmail.com

Ministry of Transport Myanmar Port Authority Invitation for Open Tender

1. Myanmar Port Authority is desirous to implement the port terminal and port related infrastructure development project at Theinbyu Foreshore Area, Yangon Inner Harbour.
2. Therefore interested Myanmar Citizen Tenderers/ Investors are cordially invited to submit the complete project proposals for the following project:
"Development and Construction of Port Terminal and Port Related Infrastructure Development project at Theinbyu Foreshore Area, Yangon Inner Harbour by BOT basic."
3. The Tender Documents including Tender Terms and Conditions shall be available to purchase with the price of US\$ 500 per set during office hours commencing from 14-5-2015 to 29-5-2015 at Civil Engineering Department, 3rd Floor, Myanmar Port Authority (Head Office), No. 10, Pansodan Street, Kyauktada Township, Yangon.
4. The detailed information about Tender can be inquired to the Civil Engineering Department by phone number 01-253358, 01- 3871116 (Ext. 305)

Myanmar Port Authority

demonstrates the Cleveland Museum of Art's sensitivity to the importance of Koh Ker to the Cambodia people."

He said the development also "highlights the serious looting that has occurred in our country." When asked how many Cambodian statues remain

in the United States, he said there are many but could not give a specific number.

William Griswold, director of the Cleveland Museum of Art, said at the ceremony, "We are pleased to welcome a new chapter in our long collaboration with Cambodia."

Kyodo News

Ways of Investment in Port Sector

Option I

- Development



Ways of Investment in Port Sector



Option II

- Investor has to initiate the potential location for port development
 - Apply the proposal to MPA to carry out feasibility study at the potential area for port development
 - Take comprehensive feasibility study for proposed area
 - Propose the development proposal to MPA according to the result of FS
 - After detail discussion of technical and other matter
 - Application procedure jointly with MPA to Union Government
 - Development stages

Ways of Investment in Port Sector

Option II

- Feasibility Study



Ways of Investment in Port Sector



Option II

- According to Feasibility Study result
 - Need to carry out stage by stage
- Development of **the terminal**



Ways of Investment in Port Sector



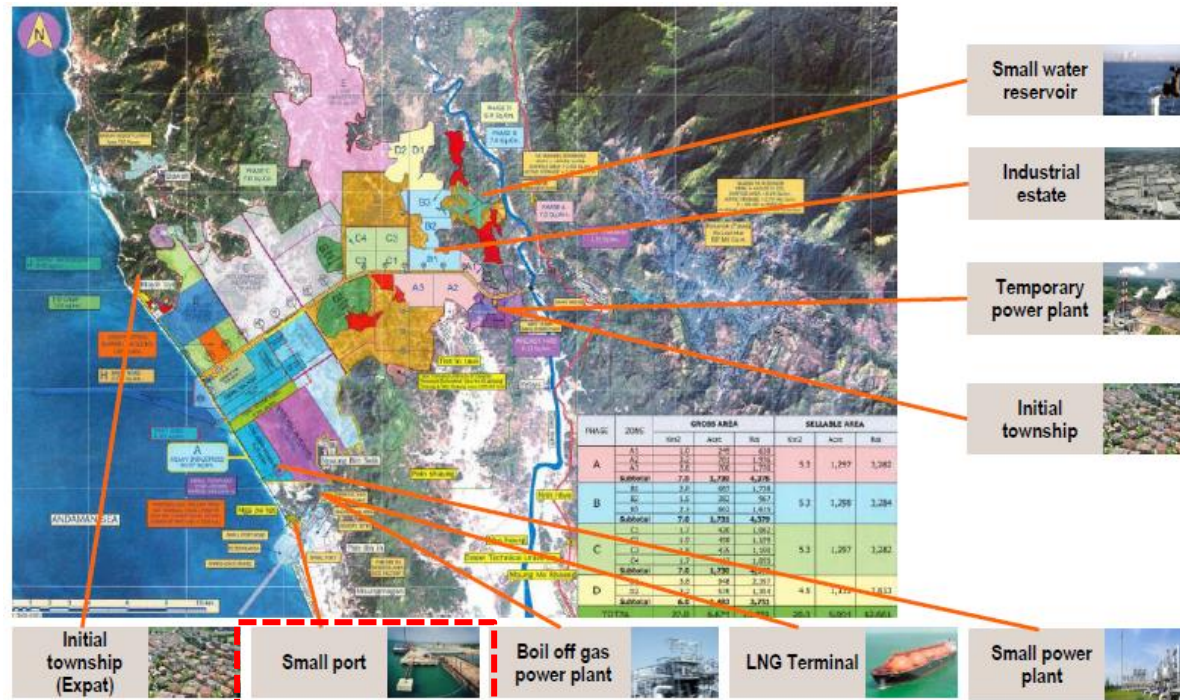
Option III

- Related with other national level development projects (eg. Dawei Special Economic Zone)
 - National level development plan
 - Deal with the Union Governmental Level development committee
 - Concessional agreement with MPA
 - Development

Ways of Investment in Port Sector

Option III

- Related with other national level development projects (eg. Dawei Special Economic Zone)



Port Sector Development in Myanmar



Conclusion

Conclusion



- For the all round development of the nation, potential investors from all over the world are warmly welcomed to cooperate, coordinate and collaborate in terms of technical know-how and investments.
- We believed that the good cooperation will be the best initiation of the port development
- Welcome to Myanmar to participate the port development sector which will be highly potential for near future

Port Sector Development in Myanmar



Thanks.