



DEVELOPMENT SCENARIO OF PORT INDUSTRY IN MYANMAR

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Outline of the Presentation

- **Port Industry in Myanmar**
- **Yangon Port Development Chronology**
- **Yangon Port Handling Statements**
- **Shipping Lines with Yangon Port**
- **Development Potential for the Port Industry**
- **Conclusion**

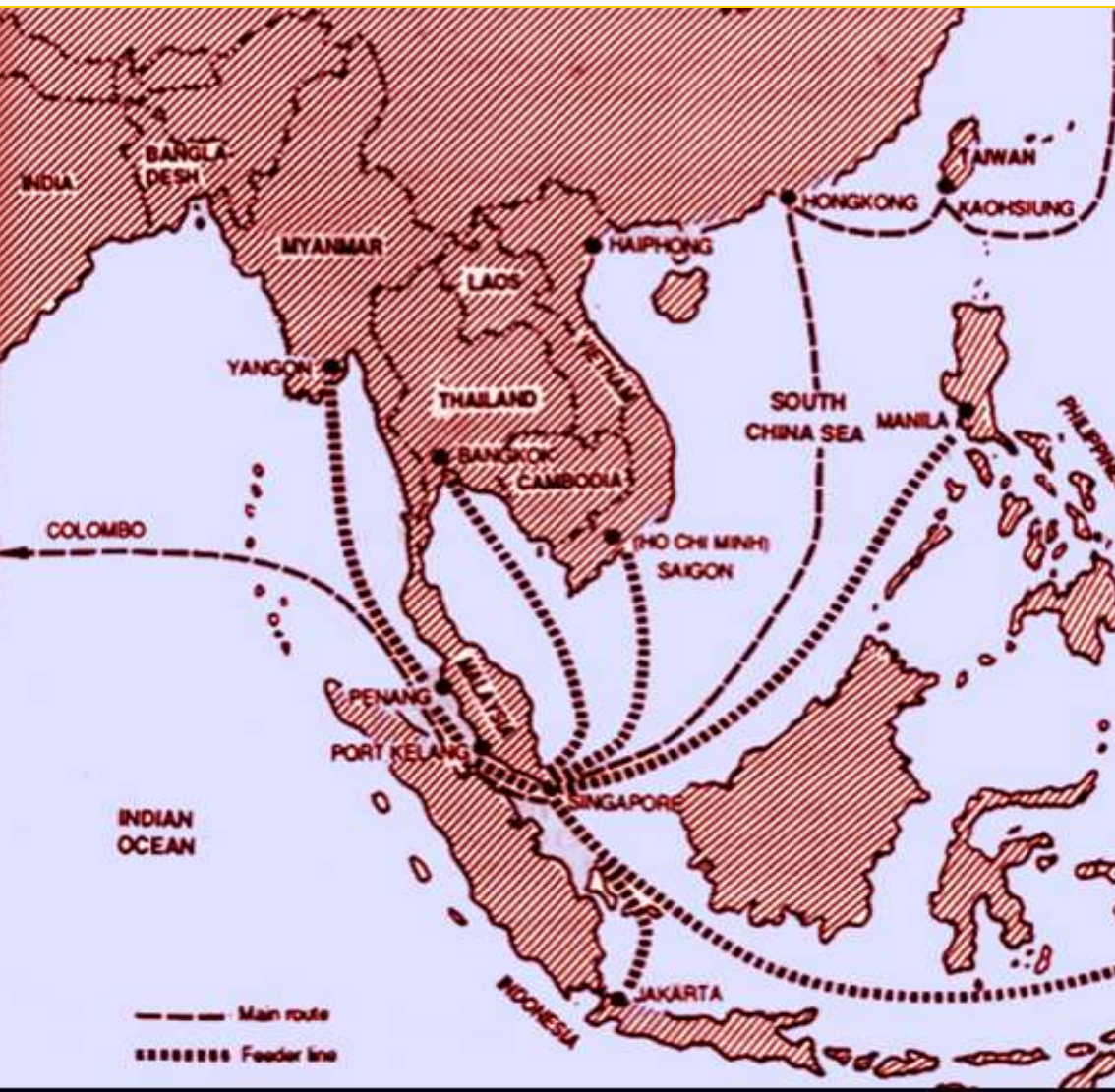


Port Industry in Myanmar



Port Industry in Myanmar

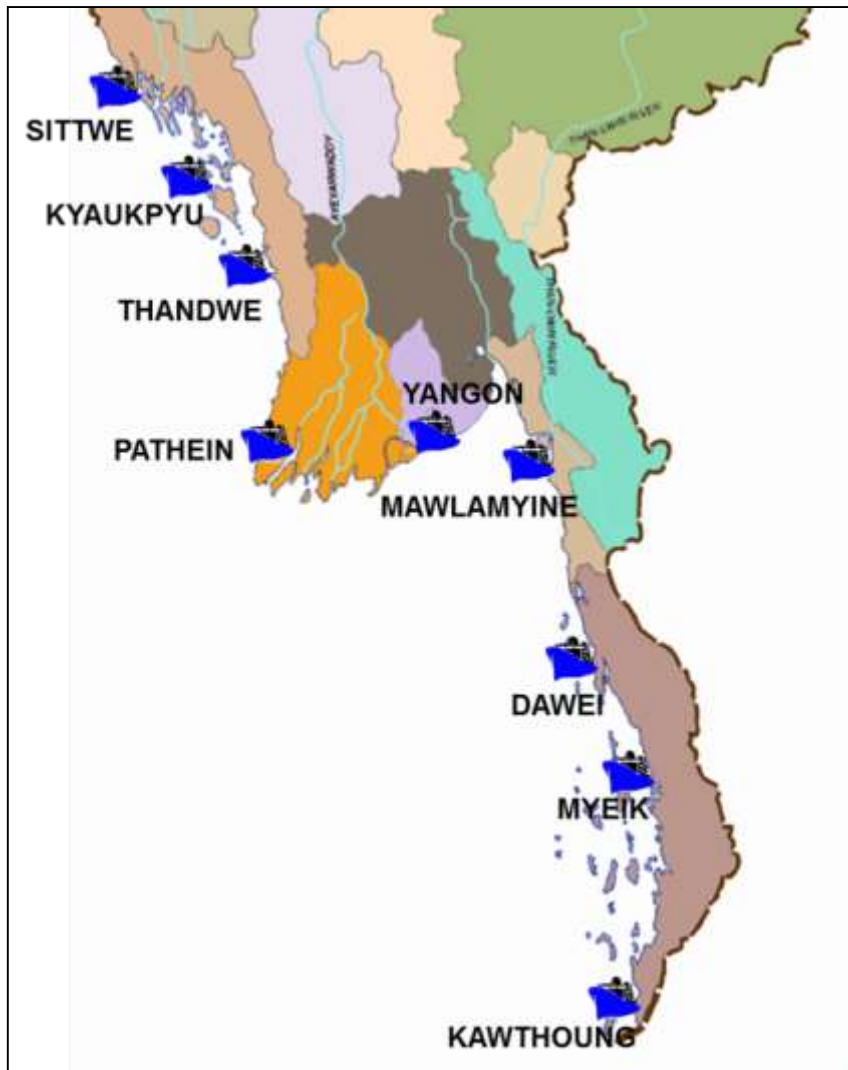
Geography Location of Myanmar



- In South East ASIA
- Long Coast line
- 1,199 miles
(1,930 km)

Port Industry in Myanmar

Ports in Myanmar



- ❖ Myanmar has a **total of nine ports** catering mainly for its seaborne and coastal trade
- ❖ spreading over the **whole coastline**
- ❖ Yangon is the main port city of Myanmar (former capital city)

Port Industry in Myanmar

Ports in Myanmar

**All ports of Myanmar are administered by single organization
Myanma Port Authority (MPA)
under the management of Ministry of Transport and Communications**



Port Industry in Myanmar

Role of Myanma Port Authority



Ministry of Transport and
Communications

Governing



Myanma Port Authority



Regulation



Facilitation



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

Port Industry in Myanmar

Myanma Port Authority



Managing Director

General Manager

**Traffic
Dept.**

**Shipping
Agency
Dept.**

**Marine
Dept.**

**Civil
Engineering
Dept.**

**Mechanical
Engineering
Dept.**

**Account
Dept.**

**Personnel
Dept.**

**Store
Dept.**

**IR & HRD
Dept.**

**Medical
Division**

**Internal
Audit
Division**

**Rakhine State
Port**

**Ayeyarwaddy
Region
Port**

**Mon State
Port**

**Tanintharyi
Region
Port**

Port Industry in Myanmar

Myanma Port Authority

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

Regulating and ***Facilitating***

*to the players
of the port and its industry.”*



Port Industry in Myanmar

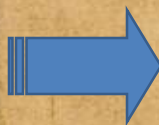
Myanma Port Authority

Missions

- ❖ to setup the autonomous 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 need



Yangon Port Development Chronology



Yangon Port Development Chronology

Evolution of the Port Administration



1755

- Chief Port of Yangon during the dynasty of “King Alaung Phaya”



1880

- the Port was administered by the Commissioners



1954

- the Board of Management for the Port of Yangon



1972

- Burma Port Corporation



1989

- Myanmar Port Authority

Yangon Port Development Chronology

Yangon Port



- The Yangon Port is a river port and premier port of Myanmar
- It is handling about 95% of maritime import and export cargo.

Yangon Port Development Chronology

Yangon Port

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)

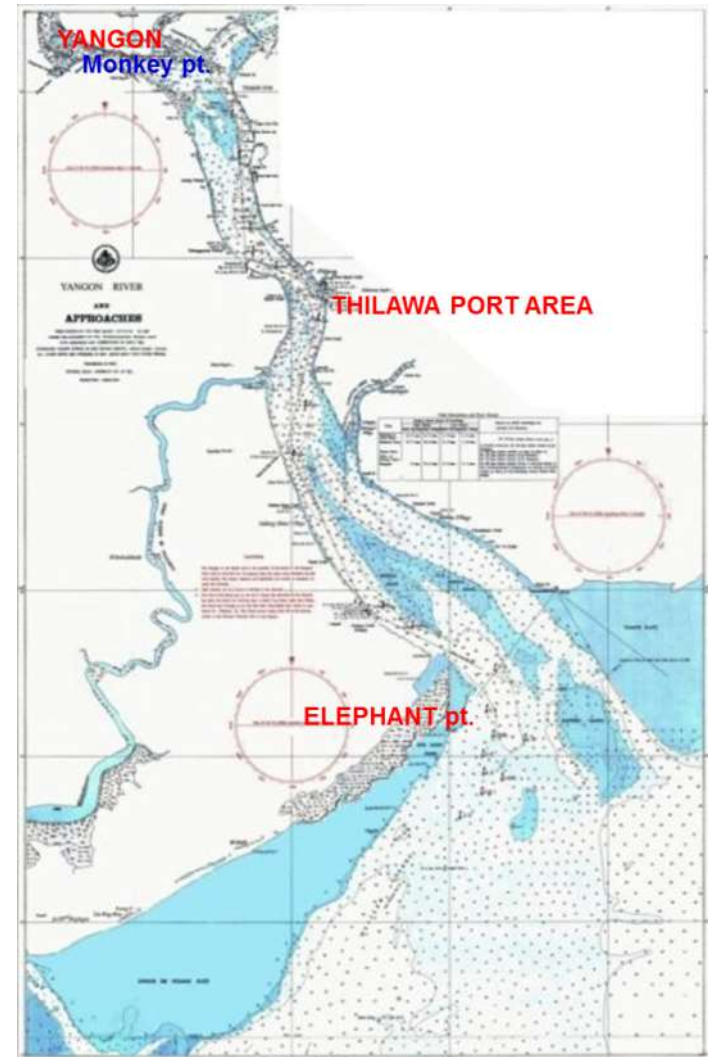
- about 19.3 feet (5.85 m) at spring tide
- about 8.4 feet (2.55 m) at neap tide

Current Velocity

- 4 to 6 knots

Wave

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



Yangon Port Development Chronology

Yangon Port Development

- ❑ 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 Chronology

Yangon Port Development

- ❑ In 1990s, the maritime cargo traffic of the Yangon Port had increased significantly.
- ❑ The efficiency in cargo handling of existing terminals had reached up to almost 70%
- ❑ More terminals and facilities have been developed within the area of the Yangon and Thilawa area.



Yangon Port Development Chronology

Thilawa Terminal Area Development



- ❑ With the growth of maritime trade under the market oriented policy
- ❑ Allowing foreign and local private investments to participate in the country economy
- ❑ In 1990s, Thilawa area has been earmarked to expand port.

Yangon Port Development Chronology

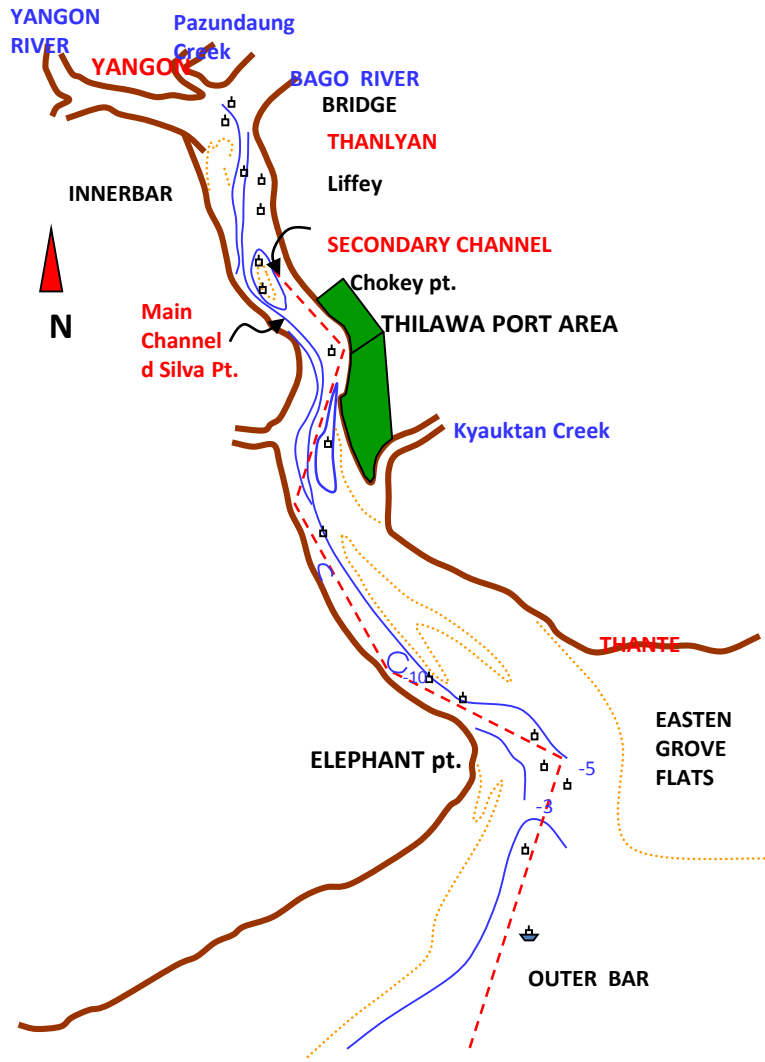
Thilawa Terminal Area Development



- ❑ For developing of port, 37 plots of water front land area were allocated.
 - 15 hectares (37 acres)
 - uniform quay length of 200
 - 750m land ward.
- ❑ Recent development of commercial port implemented in term of BOT and JV basic

Yangon Port Development Chronology

Yangon Port



Yangon Inner Harbour Terminals

- ❖ **15000 DWT**
- ❖ **LOA 167 m**
- ❖ **Draft 9 m**

Thilawa Area Terminals

- ❖ **20000 DWT**
- ❖ **LOA 200 m**
- ❖ **Draft 9 m**

There are two restricted bars along the approached channel.

- ❖ **Inner Bar (near Yangon Port at Monkey Point)**
- ❖ **Outer Bar (at the mouth of the River)**

Yangon Port Development Chronology

Yangon Port

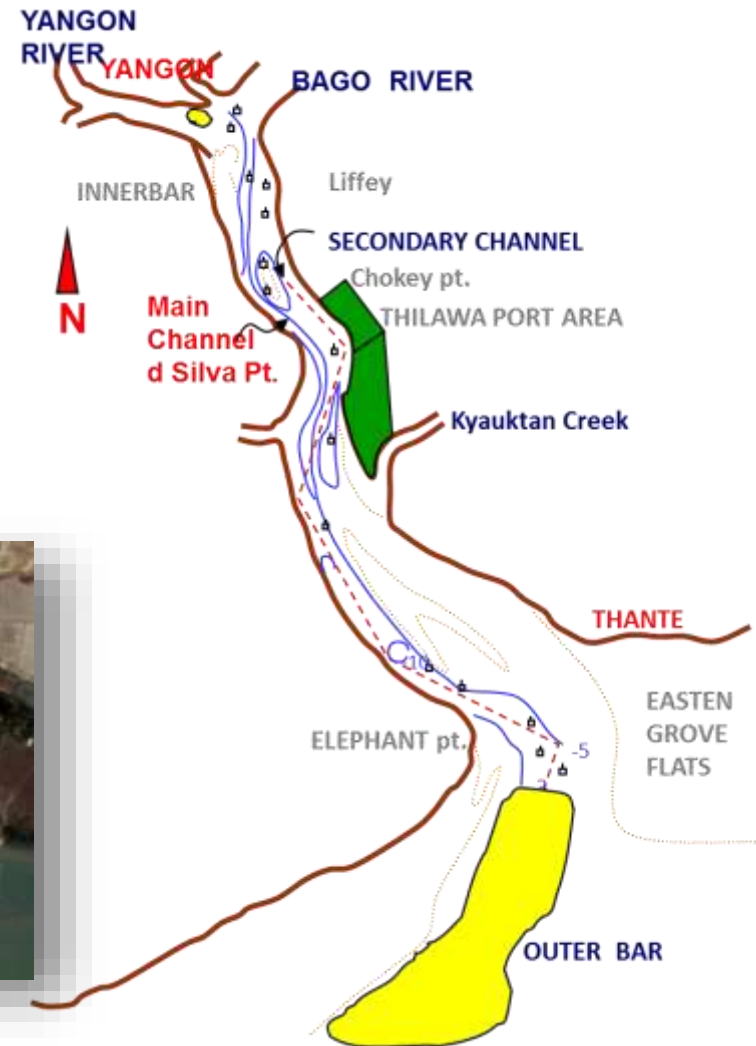
Inner Harbour Area



Yangon Port Development Chronology

Yangon Port

Thilawa Area



Yangon Port Development Chronology

Yangon Port

International wharves

Yangon Inner Harbour Area - 26 wharves

Thilawa Area - 10 wharves

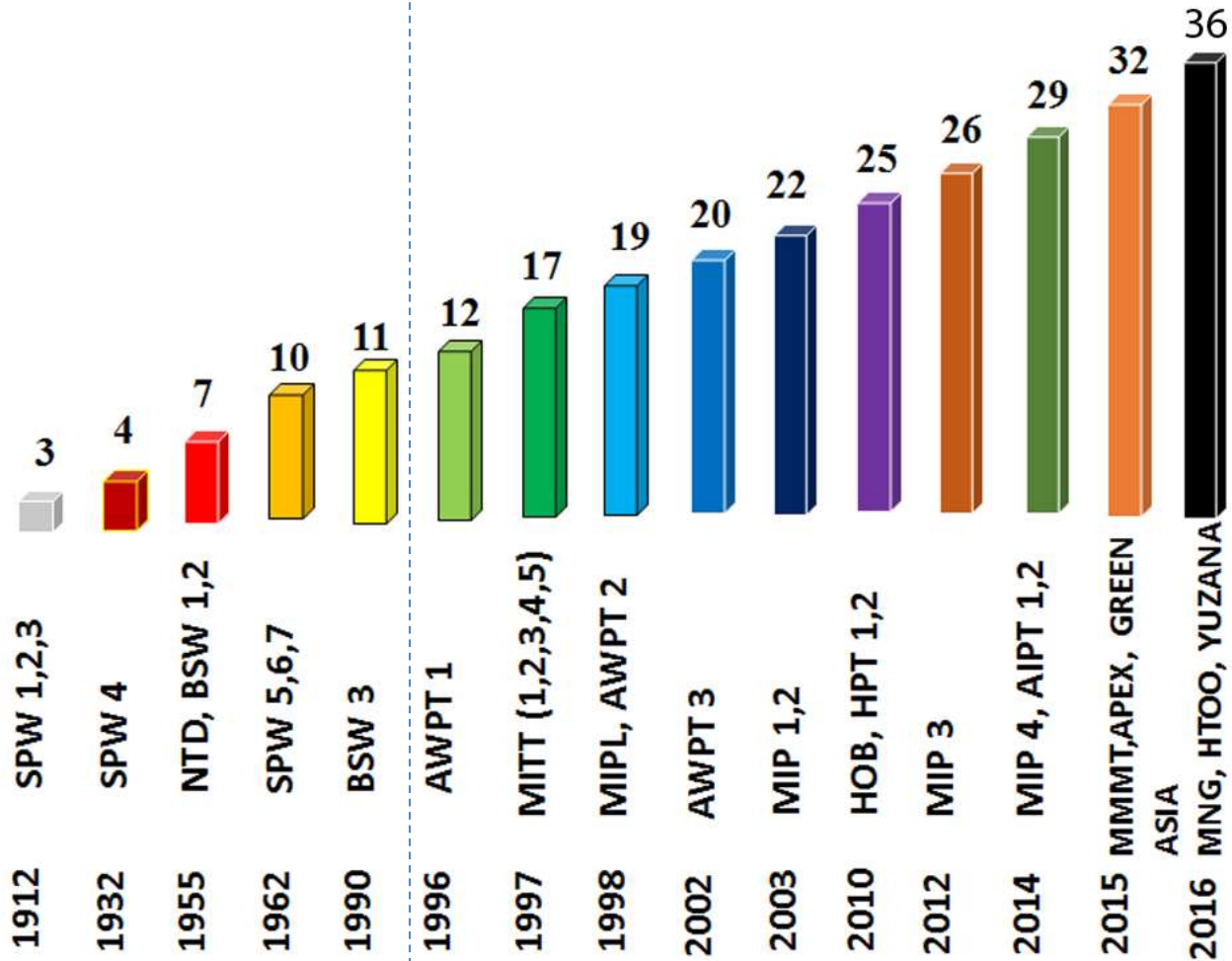
Total - 36 wharves



Yangon Port Development Chronology

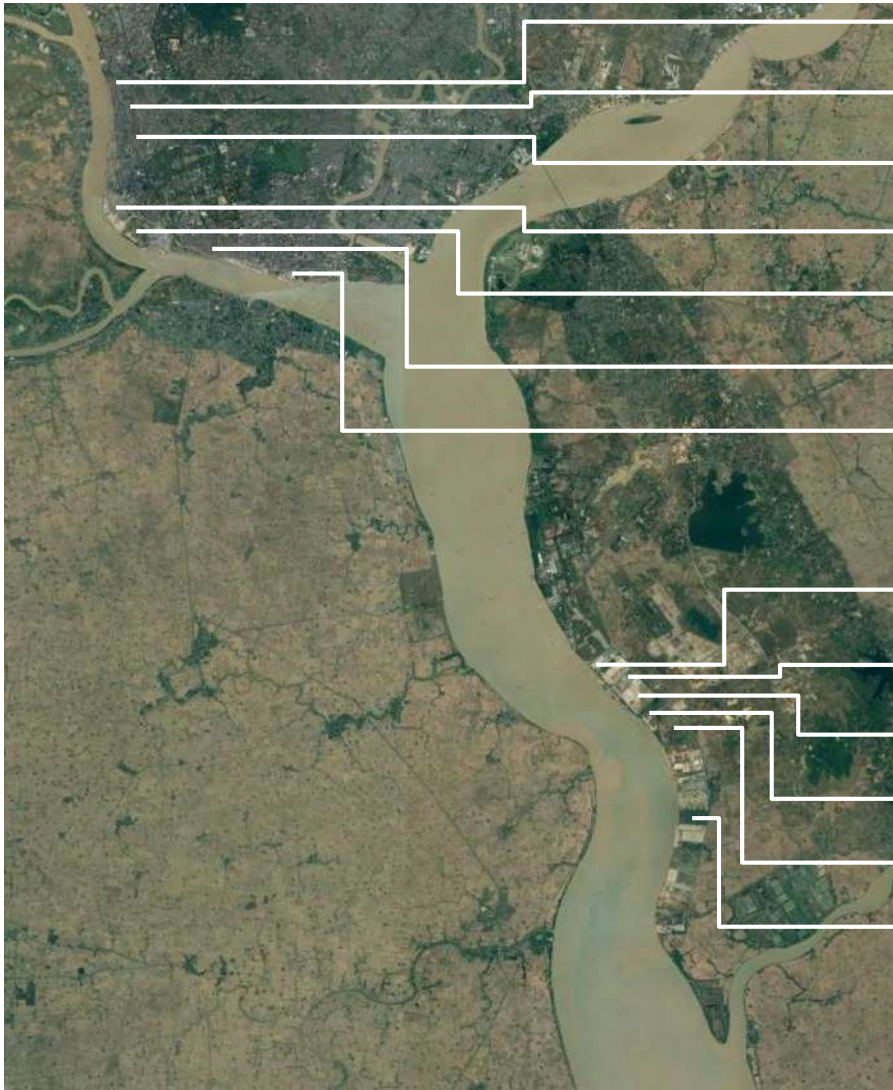
Public Terminals

Public-Private Terminals



Yangon Port Development Chronology

Yangon Port and its terminals



| | |
|----------------------------------|-------------|
| Hteedan Oil Berth (HOB) | (1) wharf |
| Hteedan Port Terminal | (2) wharves |
| Asia World Port Terminal | (3) wharves |
| Ahlone Int'l Port Terminal | (3) wharves |
| Myanmar Industrial Port | (4) wharves |
| Sule Pagada Wharves | (7) wharves |
| Bo Aung Kyaw Street Wharves | (3) wharves |
| Myat Myiter Mon Oil Terminal | (1) wharf |
| Apex Gas & Oil Terminal | (1) wharf |
| Puma Energy Terminal | (1) wharf |
| Myanmar Integrated Port Ltd., | (1) wharf |
| Myanmar Int'l Terminals, Thilawa | (5) wharves |
| Green Asia Oil Terminal | (1) wharf |

Yangon Port Development Chronology

Private Investment in Yangon Port

- ❑ All the terminals in Yangon Port were operated by MPA till 1997.
- ❑ The private investment has been allowed in Port Industry since 1998.

**PPP
Terminals
(93.6%)**



**Public
Terminals
(6.4%)**



Yangon Port Handling Statements



Yangon Port Handling Statements

Container Throughput

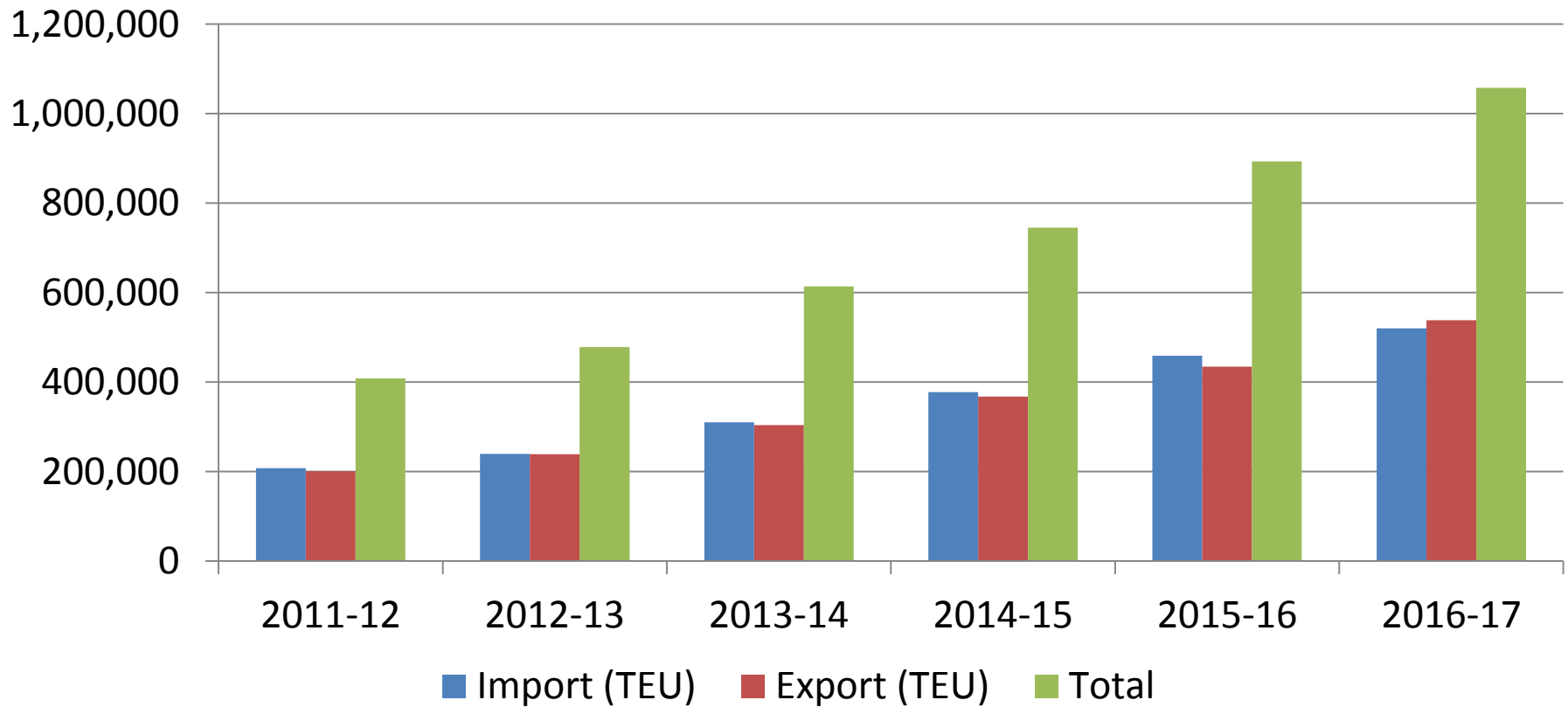
(Unit in TEU)

| Sr. No | Fiscal Year | Import (TEU) | Export (TEU) | Total | Progress% |
|--------|-------------|--------------|--------------|-----------|-----------|
| 1 | 2011-2012 | 207,540 | 200,503 | 408,043 | |
| 2 | 2012-2013 | 239,347 | 238,994 | 478,341 | (+) 15% |
| 3 | 2013-2014 | 309,767 | 303,804 | 613,571 | (+) 21% |
| 4 | 2014-2015 | 377,557 | 367,232 | 744,789 | (+) 18% |
| 5 | 2015-2016 | 459,037 | 434,164 | 893,201 | (+) 17% |
| 6 | 2016-2017 | 519,728 | 538,160 | 1,057,888 | (+) 16% |

Yangon Port Handling Statements

Container Throughput

(Unit in TEU)



Yangon Port Handling Statements

General Cargo Throughput

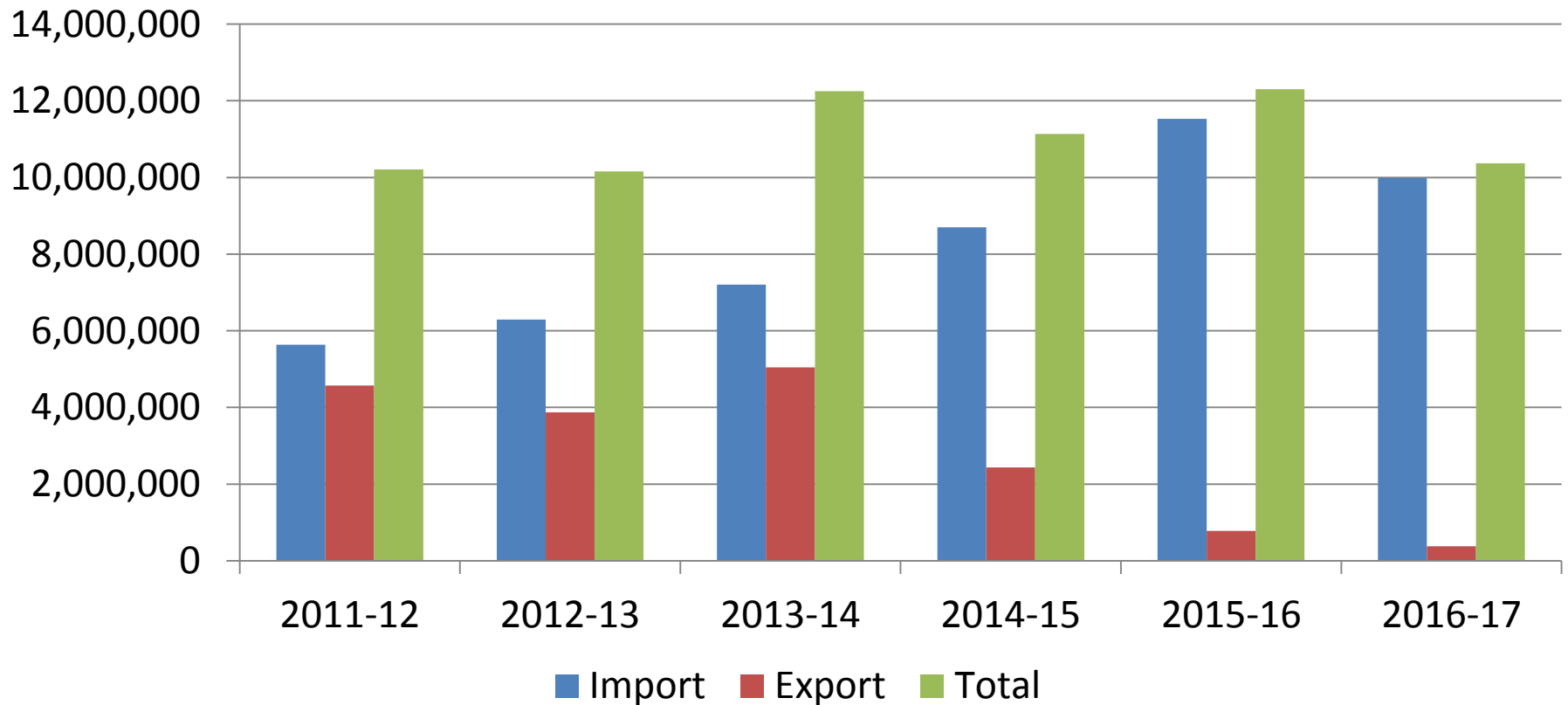
(Unit in Ton)

| Sr. No | Fiscal Year | Import | Export | Total | Progress% |
|--------|-------------|------------|-----------|------------|-----------|
| 1 | 2011-2012 | 5,637,890 | 4,569,365 | 10,207,255 | |
| 2 | 2012-2013 | 6,289,316 | 3,871,211 | 10,160,527 | |
| 3 | 2013-2014 | 7,202,162 | 5,047,790 | 12,249,952 | (+) 17% |
| 4 | 2014-2015 | 8,700,216 | 2,437,193 | 11,137,409 | (-) 10% |
| 5 | 2015-2016 | 11,525,748 | 777,031 | 12,302,779 | (+) 5% |
| 6 | 2016-2017 | 9,990,772 | 376,356 | 10,367,128 | (-) 19% |

Yangon Port Handling Statements

General Cargo Throughput

(Unit in Ton)





Shipping Lines with Yangon Port



Shipping Lines with Yangon Port

Asia World Port Terminal (AWPT)

| | |
|------------------------------|---|
| ACL |  |
| IAL |  |
| WAN HAI Lines |  |
| SAMUDERA |  |
| EVER GREEN Line |  |
| YANG MIN (S) PTE LTD |  |
| COSCO Container Lines |  |

Singapore

Malaysia

Port Klang

Penang



Shipping Lines with Yangon Port

Ahlon International Port Terminal (AIPT)

COSCO



RCL



Singapore

Malaysia

Port Klang



Shipping Lines with Yangon Port

Myanmar Industrial Port (MIP)

| | |
|-----------------------------|---|
| CHINA SHIPPING |  |
| RCL |  |
| CMA – CGM Line |  |
| Mitsui OSK Line |  |
| OOCL |  |
| Samudera |  |
| COSCO |  |
| YANG MIN (S) PTE LTD |  |
| MAERSK |  |
| CSL |  |

| |
|-------------------|
| Singapore |
| Malaysia |
| Port Klang |
| Pasir Gudang |
| Indonesia |
| Tanjung Pelapas |
| Vietnam |
| Hochiminh |
| Thailand |
| Bangkok |
| China |
| Ningb |
| Shanghai |
| Bangladesh |
| Chittagong |
| India |
| Kolkata |



Shipping Lines with Yangon Port

TMT Port Terminal

| | |
|--------------------------|---|
| MFSL |  |
| HERBILAN SHIPPING |  |
| BLPL. |  |

Malaysia

Port Klang

India

krishnapatnam

Vizag

Chennai

Sri Lanka

Colombo



Shipping Lines with Yangon Port

Myanmar International Terminals, Thilawa (MITT)

| | |
|---------------------|--|
| LAND AND SEA | |
| MAERSK |  |
| RCL |  |
| COSCO |  |
| PIL |  |
| MOL |  |
| SAMUDERA |  |

Singapore

Malaysia

Port Klang

Iran



Shipping Lines with Yangon Port

| | |
|------------------------------|------|
| Container Shipping Line | (20) |
| Number of Vessels | (46) |
| Direct Destination Countries | (10) |





Development Potential for the Port Industry



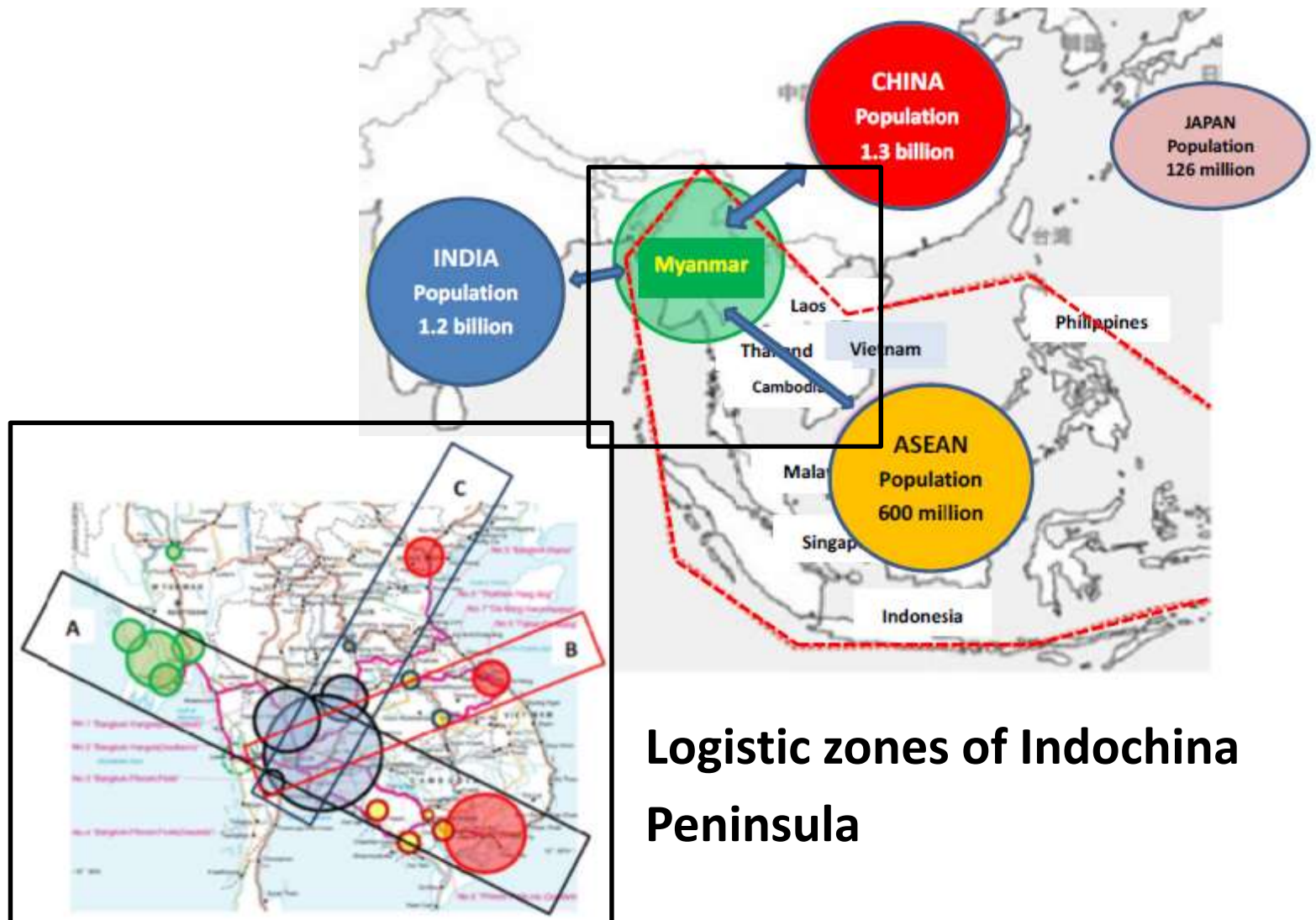
Development Potential for the Port Industry

Strategic Location with Regional Economic Corridors



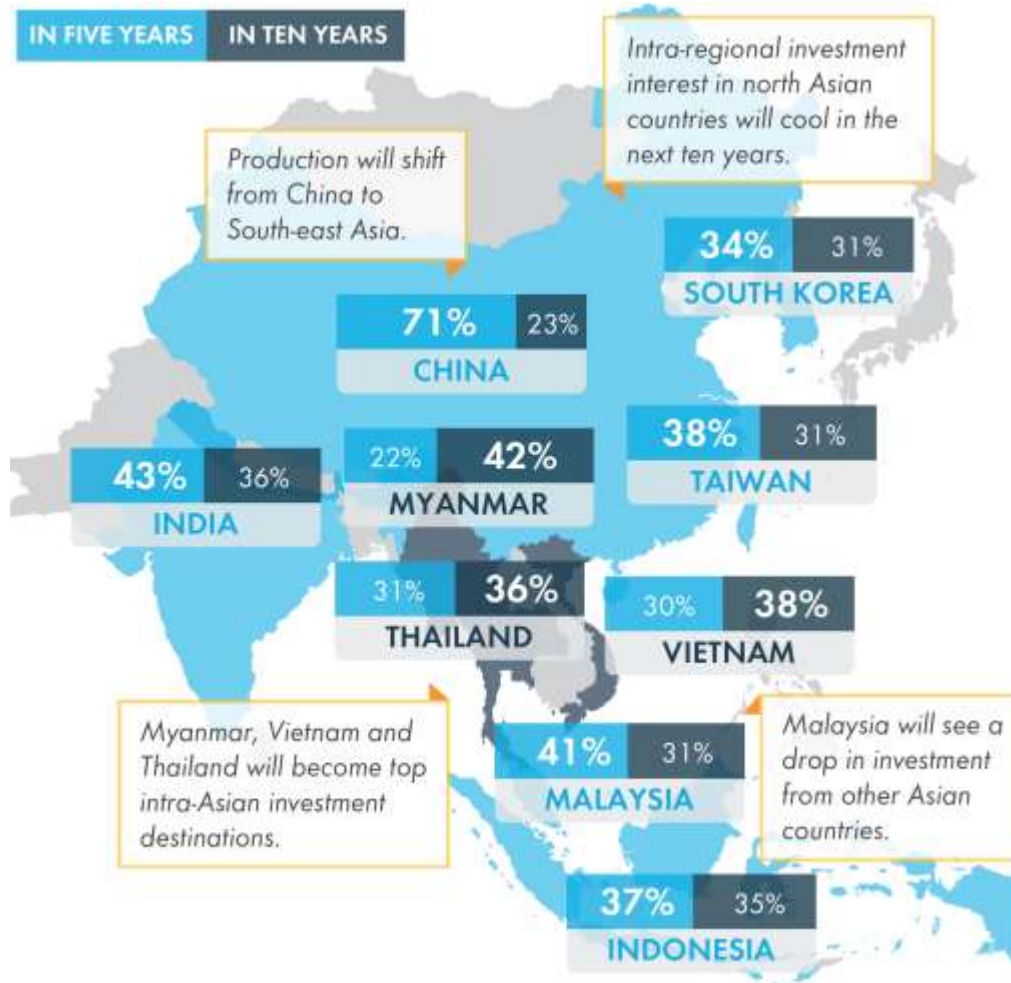
Development Potential for the Port Industry

Local Connectivity to Regional Connectivity



Development Potential for the Port Industry

Economic relationships between Asian countries



- The Economist Intelligence Unit in March 2015 surveyed 525 business leaders in seven Asian countries
- The results suggest that trade and investment ties are going to become increasingly complex, as
- Multinational companies seek new markets throughout the region.

Development Potential for the Port Industry

China's new Silk Road and Myanmar

One belt, one road – China's new Silk Road



Development Potential for the Port Industry

Deep seaport Concept:

New Hub of South East Asia



Development Potential for the Port Industry

Port Expansion in Thilawa Area



| | | |
|---|------------------|-------|
| 1. Developed | 10 | Plots |
| 2. Under Construction (GC Terminal) | 5 | Plots |
| 3. Under Construction (Tanker Berth) | 10 $\frac{1}{3}$ | Plots |
| 4. Under Construction (Grains Terminal) | 5 $\frac{2}{3}$ | Plots |
| 5. MPA(ODA Loan) | 3 | Plots |
| 6. MoTC | 2 | Plots |
| 7. Liquid Bulk Terminal | 1 | Plot |

Development Potential for the Port Industry

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 Foreign Countries (ODA or Other scheme)
- Related with other national level development projects (eg. Dawei Special Economic Zone)

Development Potential for the Port Industry

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

Development Potential for the Port Industry

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

Development Potential for the Port Industry

Ways of Investment in Port Sector

Option III

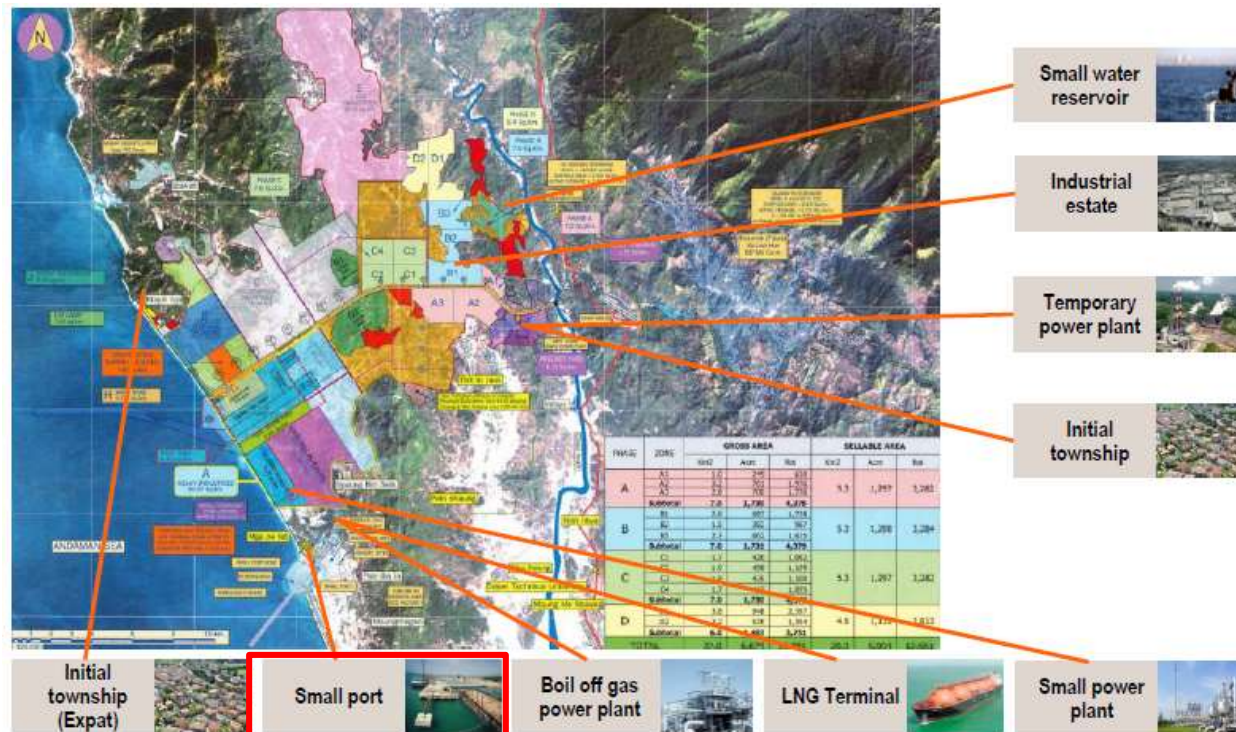
- Related with other national level development projects (eg. Dawei Special Economic Zone)
- National level development plan
- Deal with the Union Governmental Level development committee
- Concessional agreement with MPA
- Development

Development Potential for the Port Industry

Ways of Investment in Port Sector

Option III

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





Conclusion



Conclusion

- Port infrastructure is one of the most important roles for the all round development of the nation
- Myanmar has given great emphasis to the transport sector development to meet the international standards in order to support the economic and social development of the state.
- Potential investors from all over the world are warmly welcomed to cooperate, coordinate and collaborate in terms of technical know-how and investments.



THANKS FOR YOUR ATTENTION . . .

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