



Myanmar

Port Development Scenario in Myanmar



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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 Development Scenario 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	



Port Development Scenario 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 Myanma Port Authority which is known today since 31st March 1989.



Roles of Myanmar Port Authority



Ministry of Transport

Governing



Myanmar Port Authority

Regulation

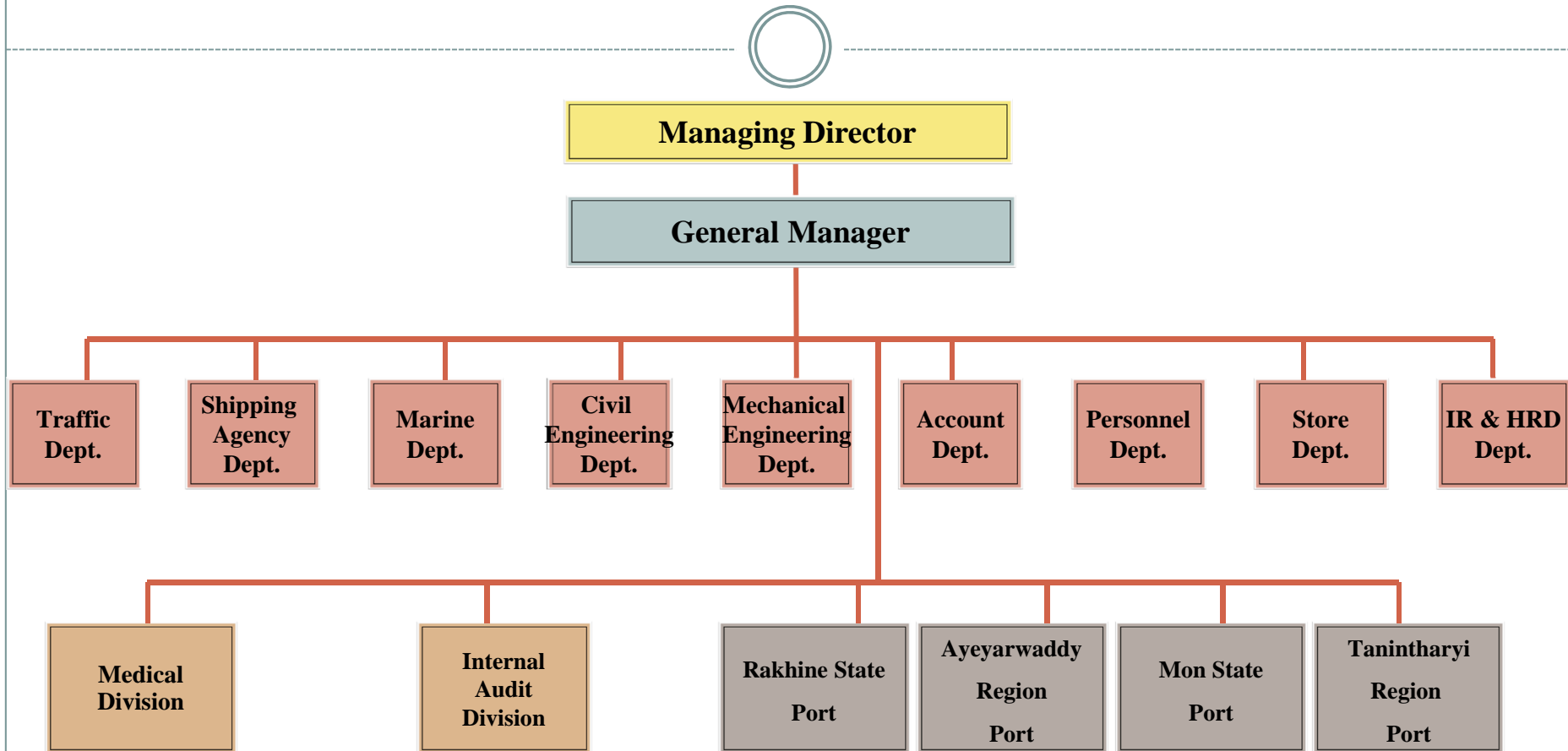
Facilitation



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



Organization Structure



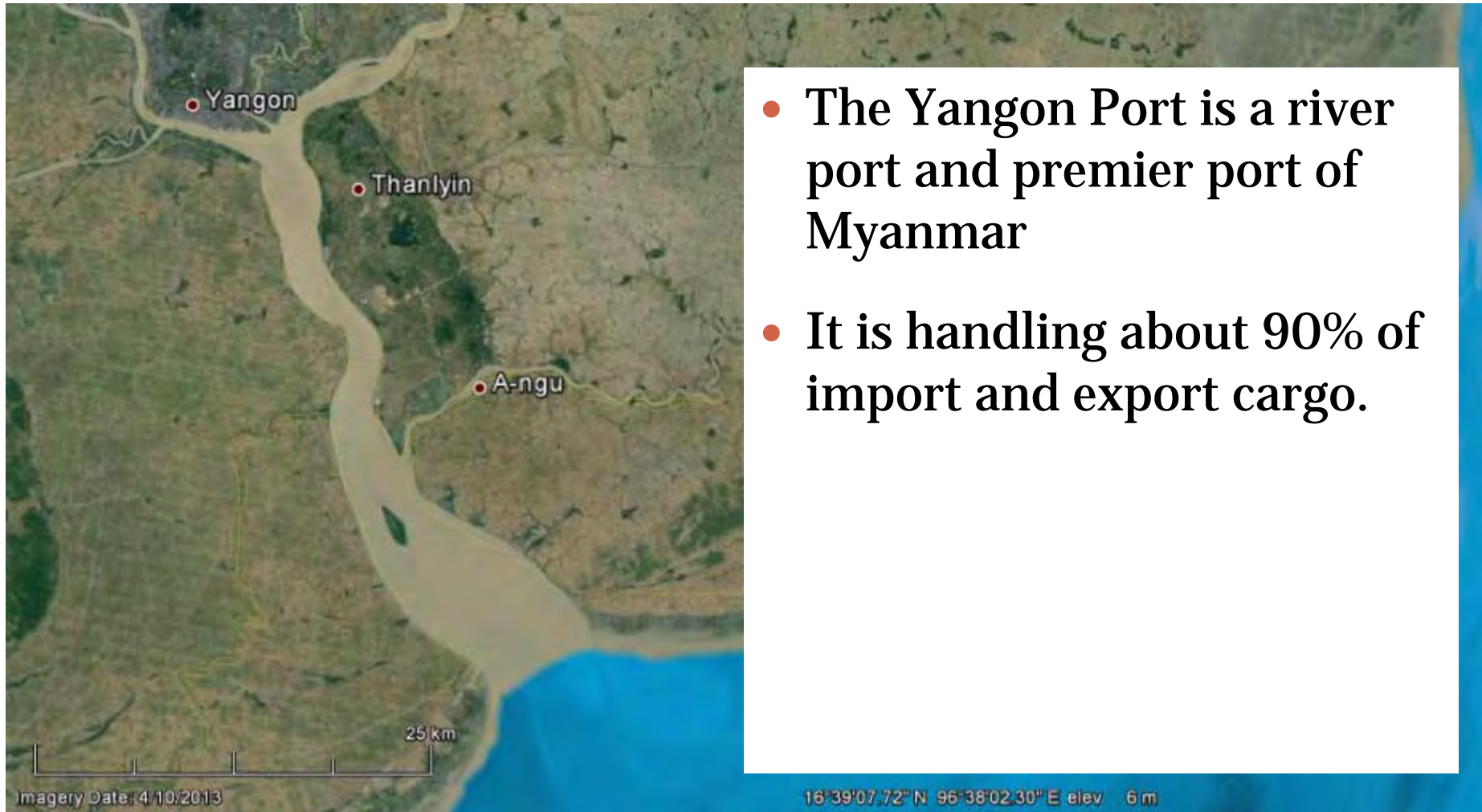
Ports in Myanmar

Rakhine State	443 Miles
Sittwe Port	
Kyaukphu Port	
Thandwe Port	
Ayeyarwady Region	272 Miles
Patheingyi Port	
Mon State	
Mawlamyine Port	
Tanintharyi Region	670 Miles
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.

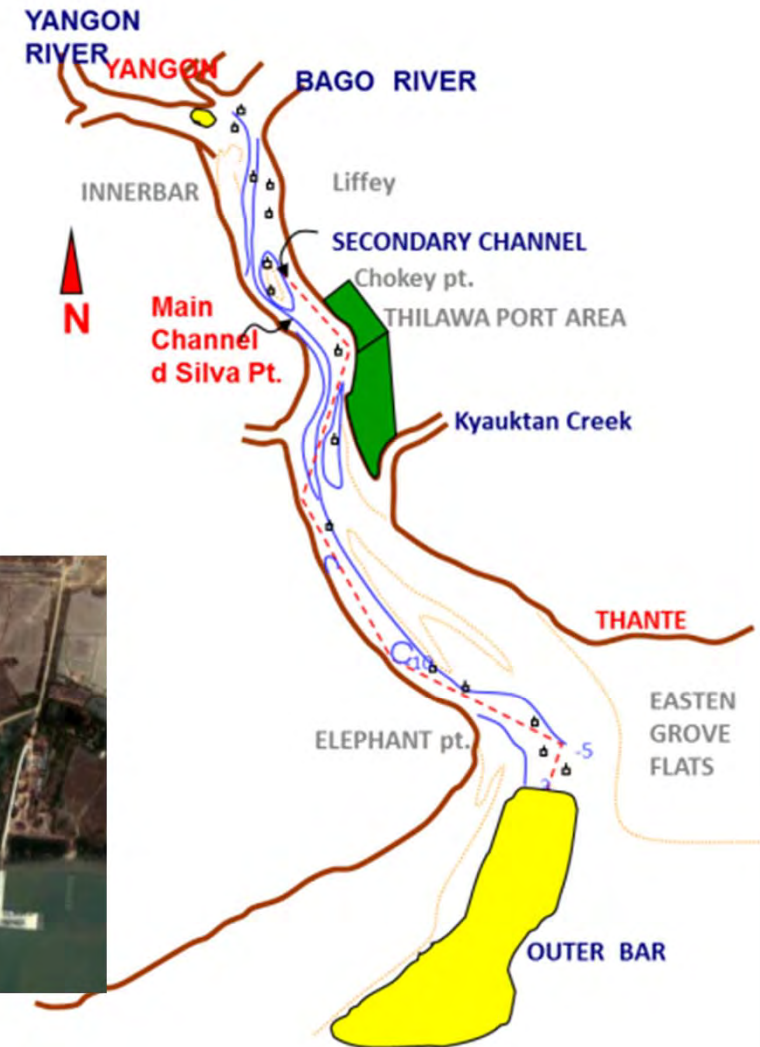
Yangon Port

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 |

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)

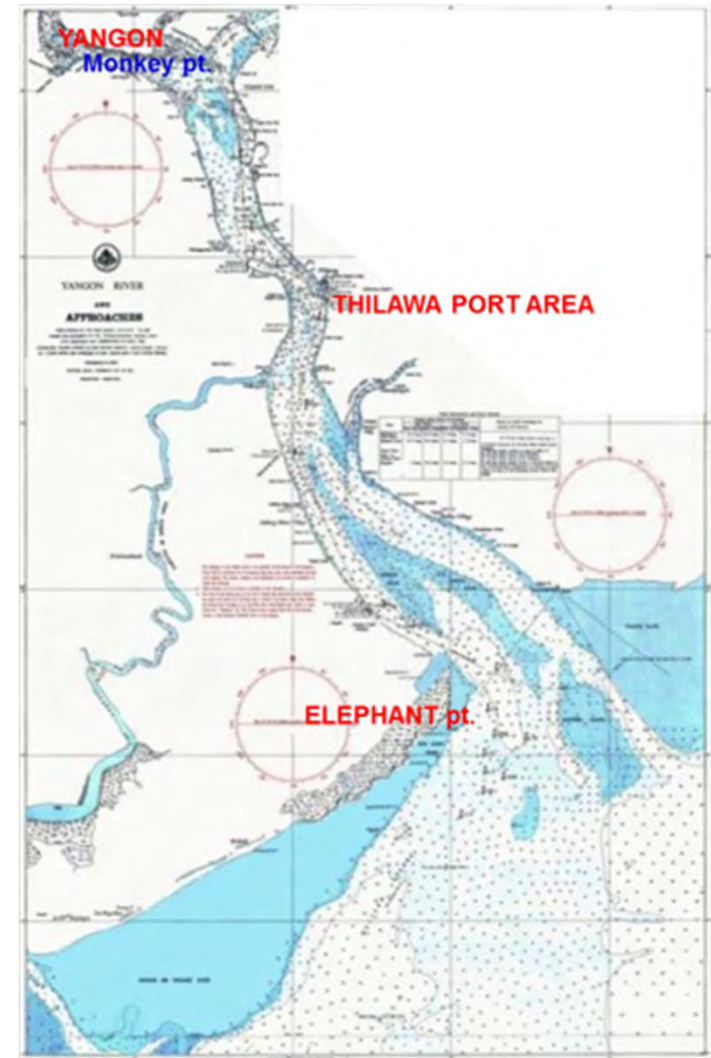
- about 19.3 feet (5.85 m) at spring tide
- about 8.4 feet (2.55 m) at neap tide

Current Velocity

- 4 to 6 knots

Wave

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



Public and Private Ownership Ratio of Port Facilities



Ownership Ratio (Quay length)



■ Private (82 %) ■ Public (18 %)

Cargo Throughput (General Cargo)



(Matrix Ton)

No	Year	Import	Export	Total
1	2006-2007	1,621,010	749,358	2,370,368
2	2007-2008	1,726,800	885,345	2,612,145
3	2008-2009	1,485,000	3,004,119	4,489,119
4	2009-2010	2,594,606	1,332,885	3,927,491
5	2010-2011	5,553,545	1,957,907	7,511,452
6	2011-2012	3,132,302	1,876,712	5,009,014
7	2012-2013	6,289,316	3,871,211	10,160,527
8	2013-2014	7,202,162	5,047,790	12,249,952
9	2014-2015	9,670,919	2,437,193	12,108,112
10	2015-2016	11,525,748	775,002	12,300,750

Container Handling Throughput



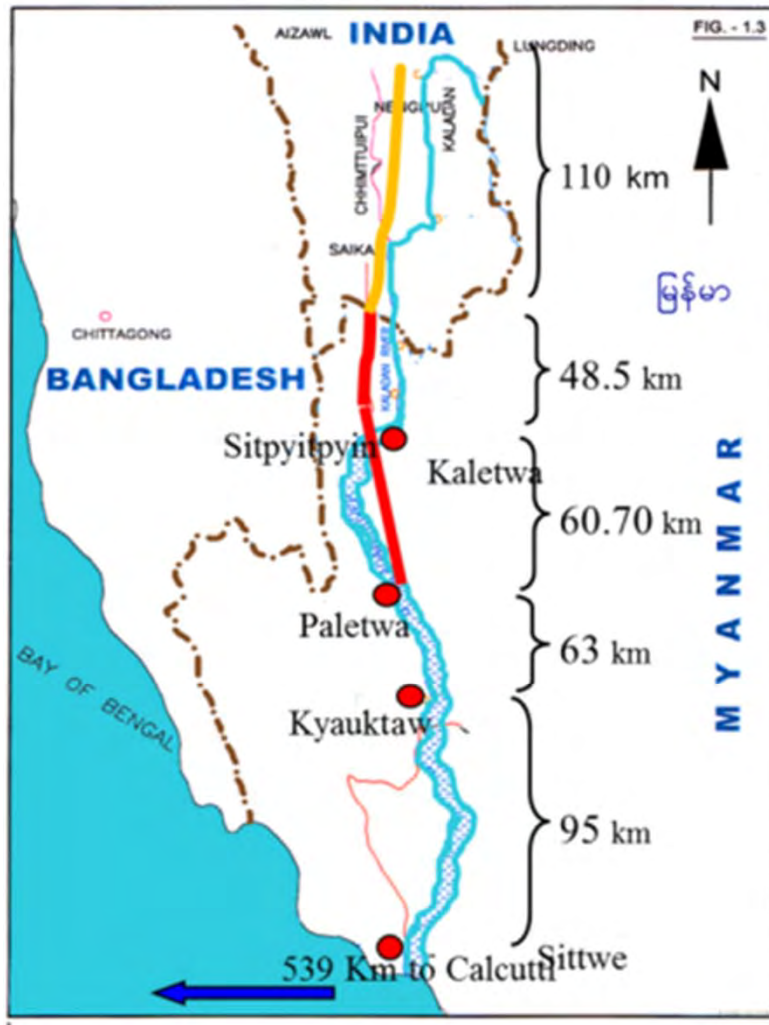
No	Year	Import (TEU)	Export (TEU)	Total TEU
1	2006-2007	99,857	96,832	196,689
2	2007-2008	119,201	127,195	246,396
3	2008-2009	134,457	151,497	285,954
4	2009-2010	150,041	147,938	297,979
5	2010-2011	175,315	171,327	346,642
6	2011-2012	209,932	203,445	413,377
7	2012-2013	239,347	238,993	478,340
8	2013-2014	309,767	303,804	613,571
9	2014-2015	377,557	367,232	744,789
10	2015-2016	459,037	434,164	893,201

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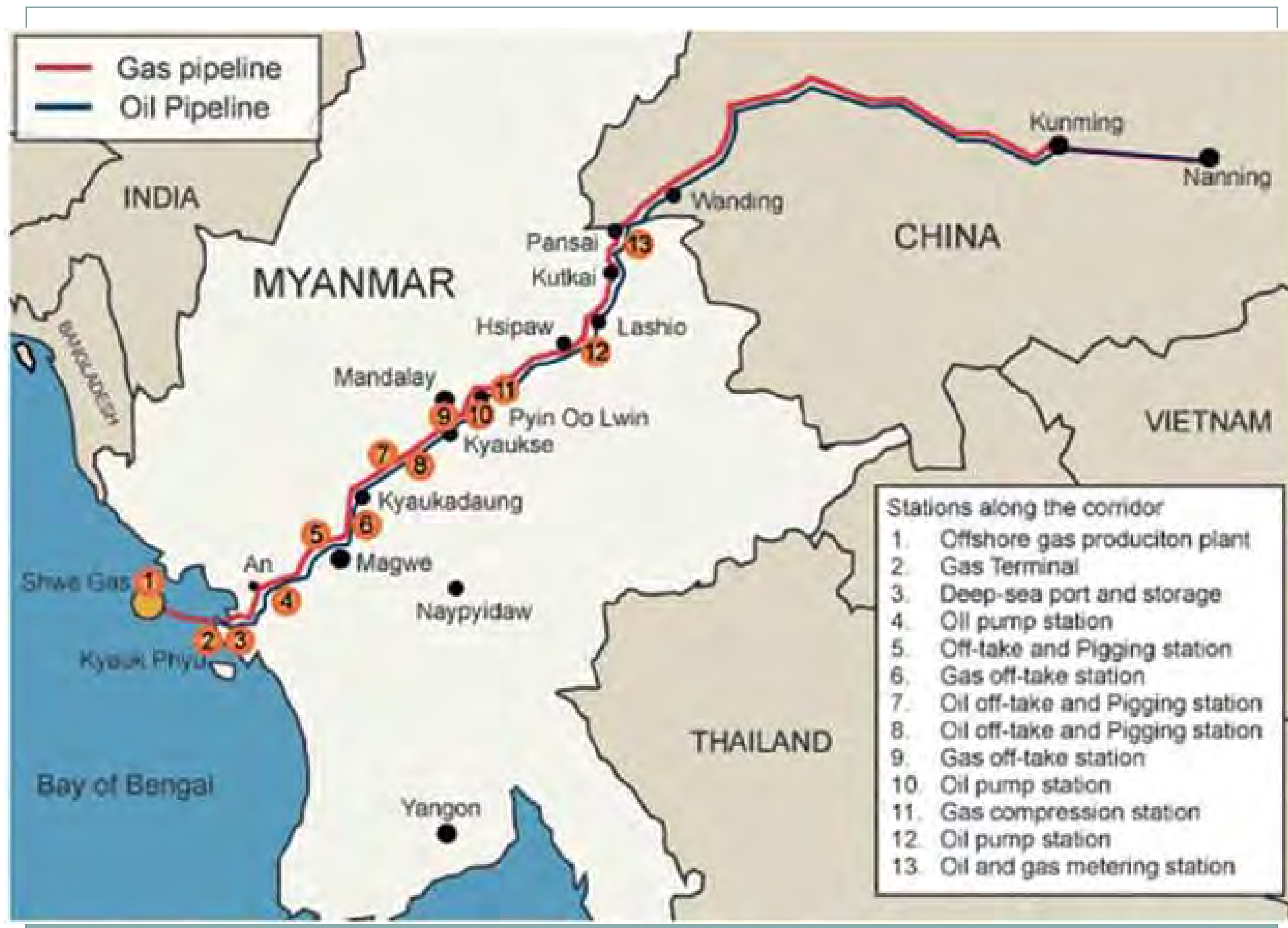


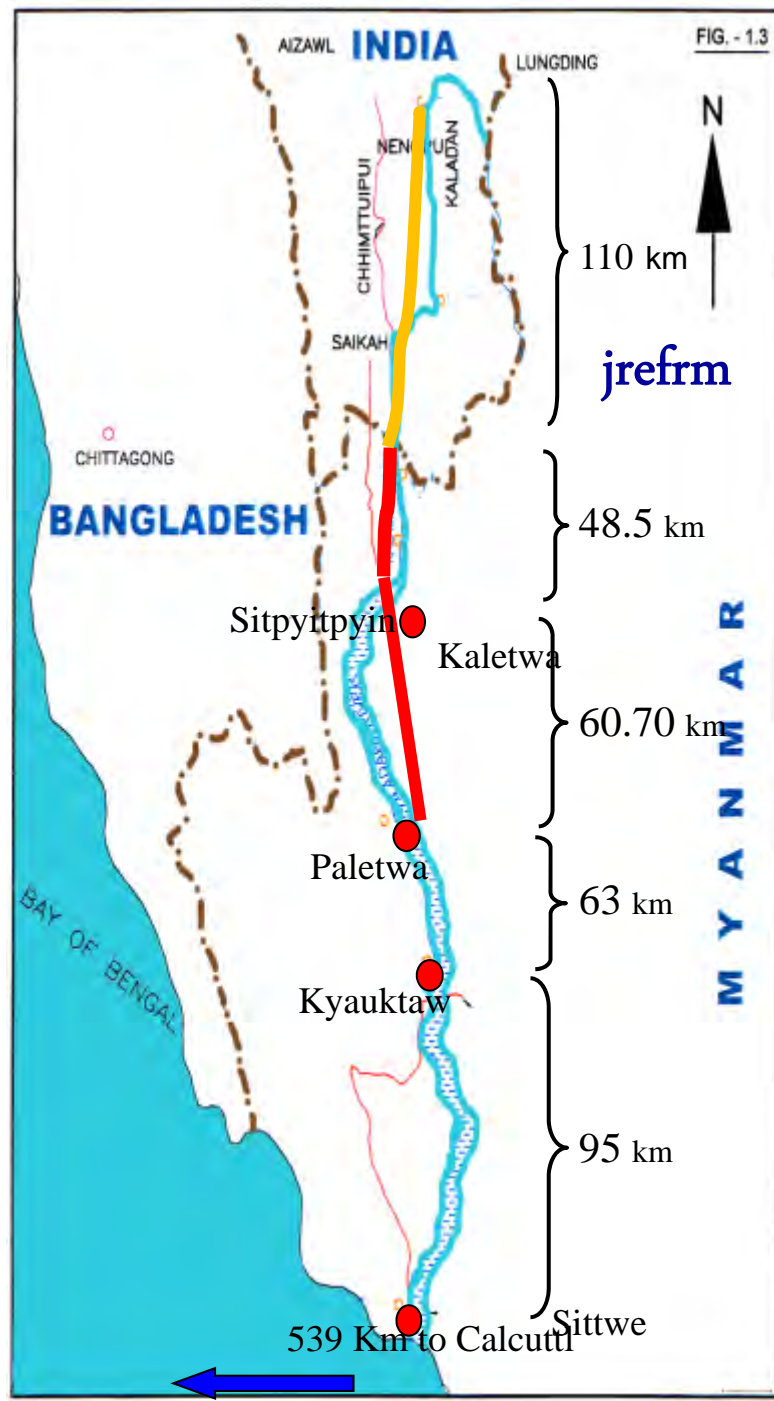
Calcutta ➡ Sittwe(Thro Kaladan River) ➡ Mizoram(Aizawl) 1294 Kilometer

Kaladan Multimodal Transport Project



- **Project Cost - 484 Million USD**
- **Terminal Construction for cross docking from Sea Cargo Vessels to Reversing Cargo Barges**





Estimate Cost

Sittwe Port

The Project cost for marine related items including wharf at Sittwe wharf at Palaw six number of 300 tons river barges and Kaladan river navigation channel development work.

USD 160 millions

Construction of the Highway

USD 320 millions

Road from Palatwa to the border of Myanmar-India

USD 480 millions

Total

Kyauk Phyu (Made Island) Tanker Port



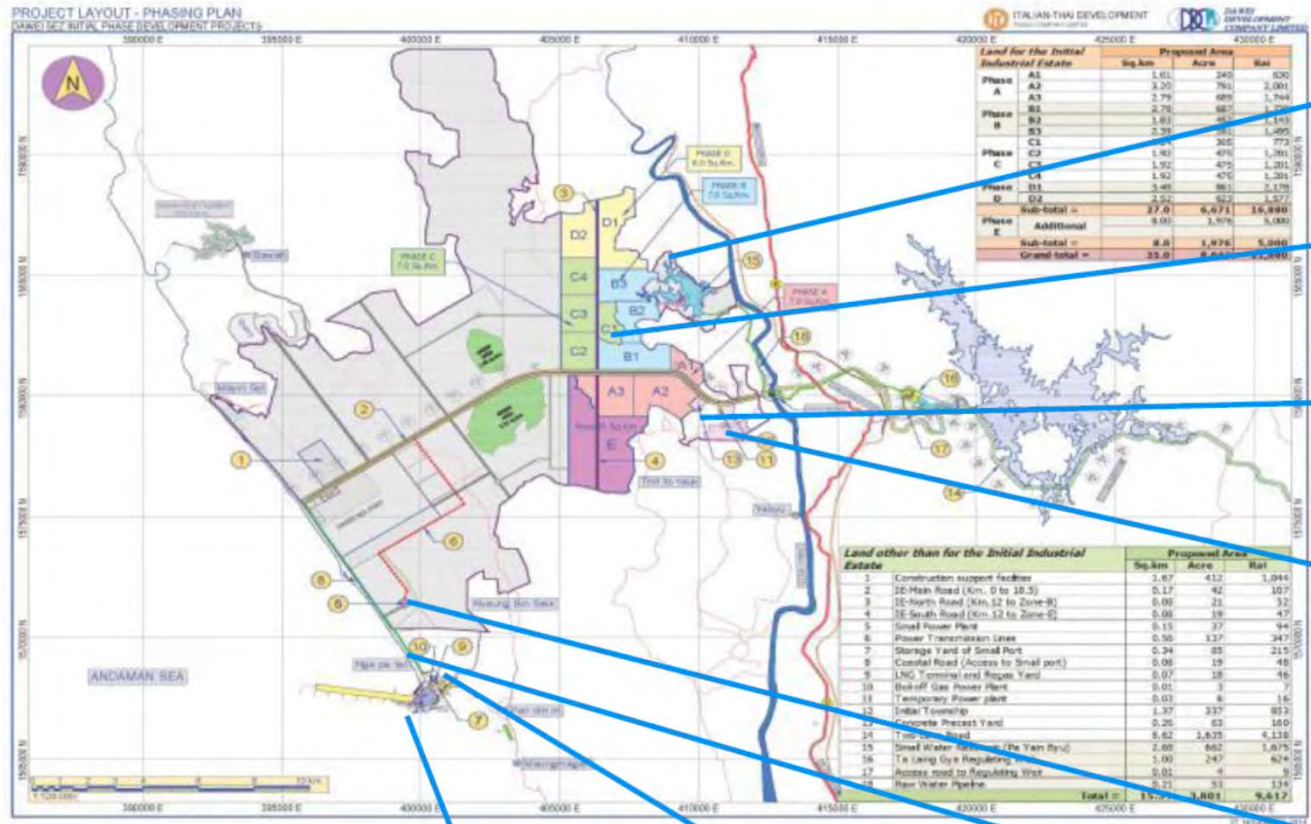
Wharf = LOA 300 m, 60 meter wide, draft 26 meter
Construction started = 1st April 2011
Completed = 31st May 2013

Dawei Economic Zone



2016 ckESpf? arv

Dawei SEZ and Small Port



Small water reservoir



1

Industrial estate



2

Temporary power plant



3

Initial township



4

2-lane Road



5

Telecom Landline



6

Small port



9

Boil off gas power plant



3

LNG Terminal



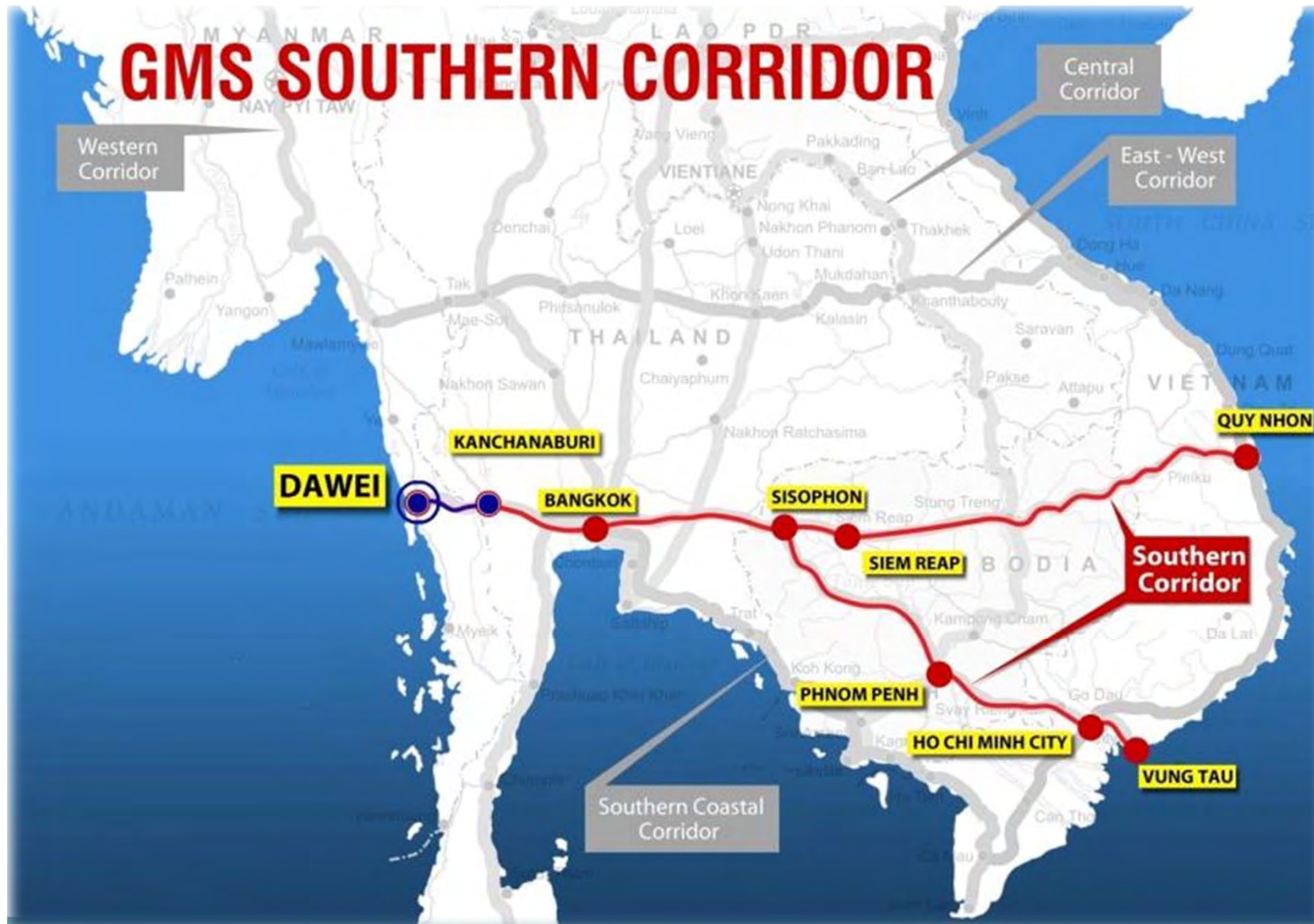
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Small power plant

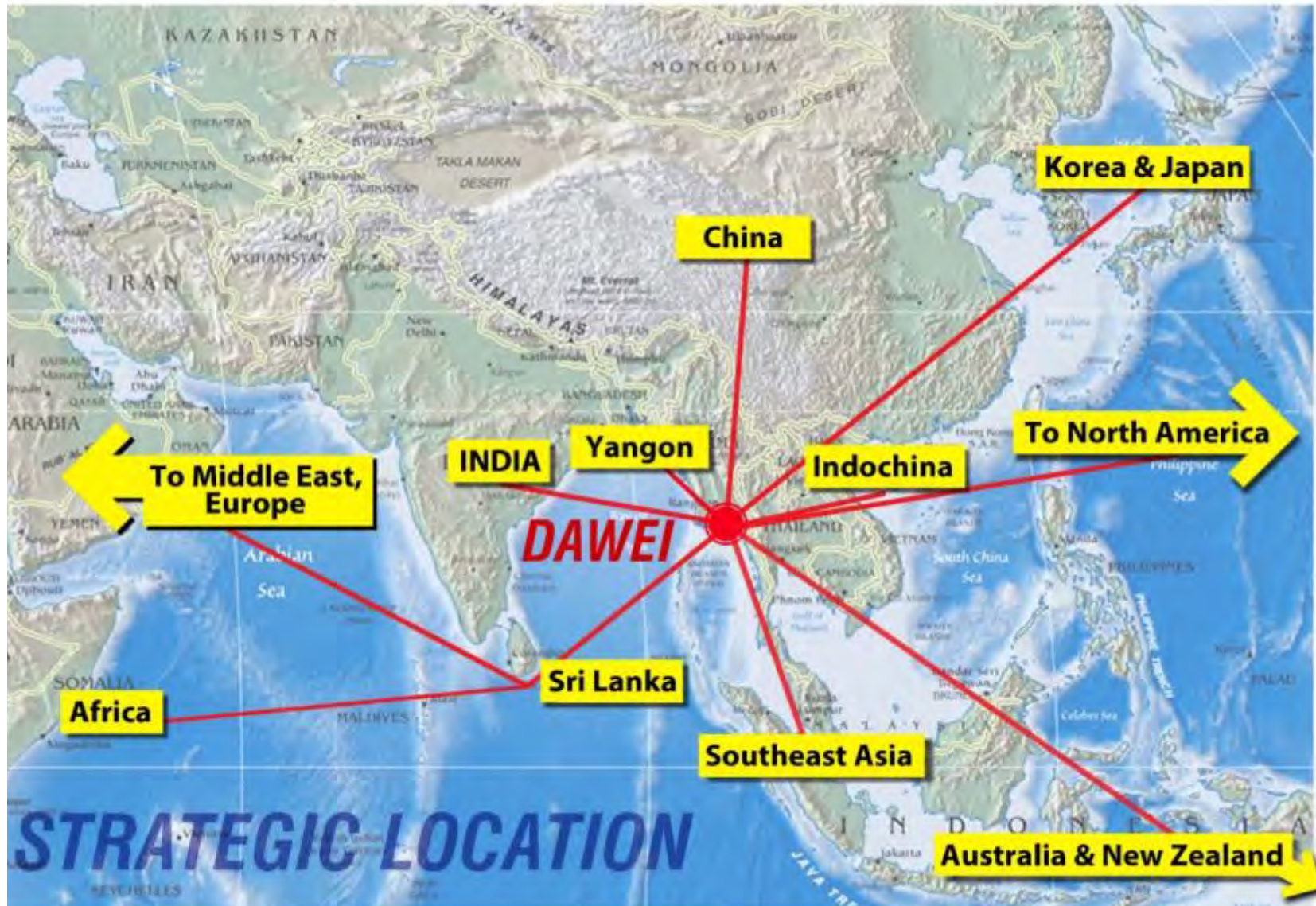


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Landbridge Logistic



Logistic Networks



Dawei SEZ Initial Phase Development Projects

Concession Period: 50 Years plus 25 years extension

- 1. Two-lane Road, connecting Dawei SEZ with the Thai border**
- 2. Small Port**
- 3. Initial Industrial Estate (consisting of Land Development and Waste Water, Water Distribution and Power Distribution)**
- 4. Boil-off Gas and Temporary Power Plants**
- 5. Initial Phase Power Plant (CCGT)**
- 6. Small Water Reservoir**
- 7. Telecommunications Landline**
- 8. Initial Township**

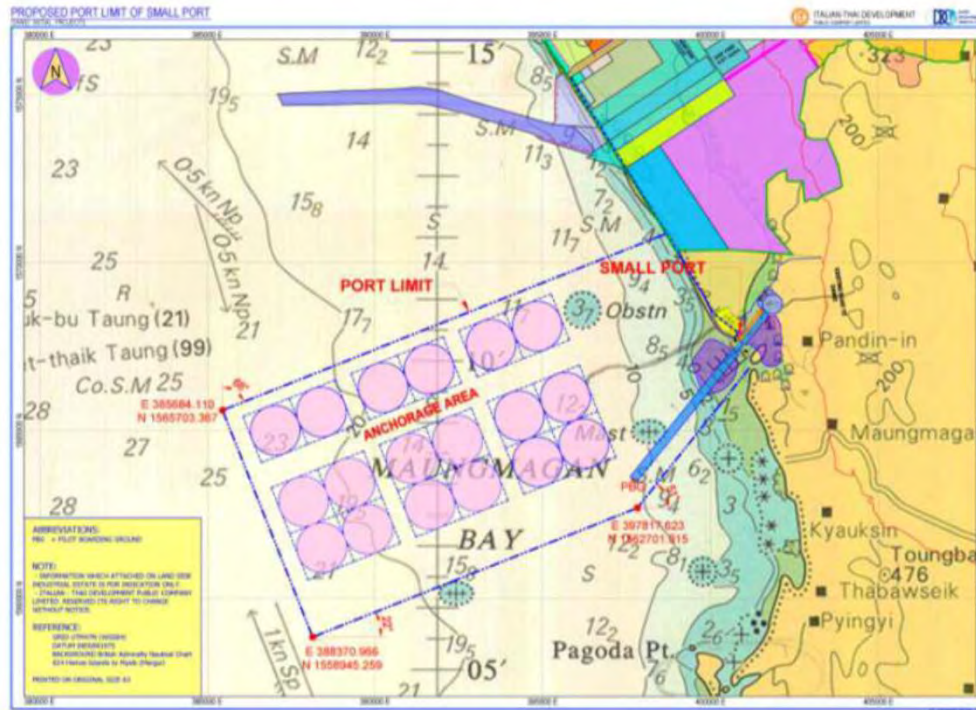
2. Small port



Small Port – Site Location



Dawei SEZ and Small Port



Key characteristics

- > 2 berths
- > Approach channel, basin, breakwaters, shore protection, reinforced concrete jetty structure (i.e. platform, dolphin and trestle)
- > Storage yard and other facilities, machinery, and equipment related to its operation
- > Coastal road link to Main Road leading to the initial industrial estate
- > Approach channel to accommodate large LNG vessels

Port Development Scenario 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.

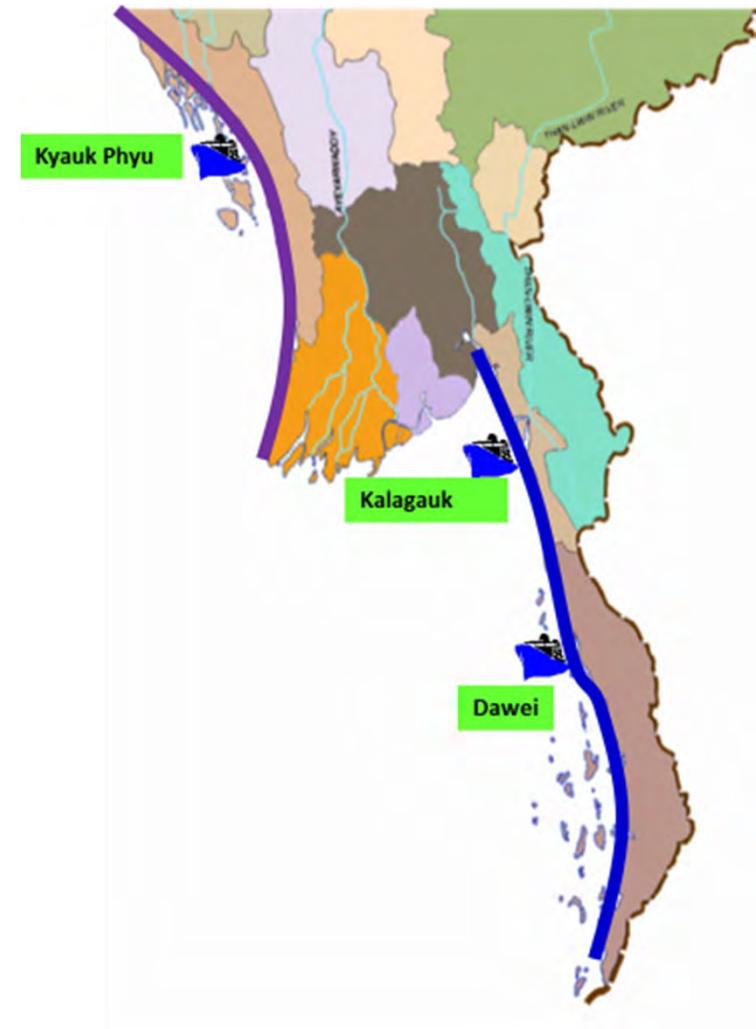
Port labourer's supply system



- 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

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 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

Port Development Scenario 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 Development Scenario in Myanmar



Thanks.