



Future Outlook for Myanmar Petrochemical Enterprise

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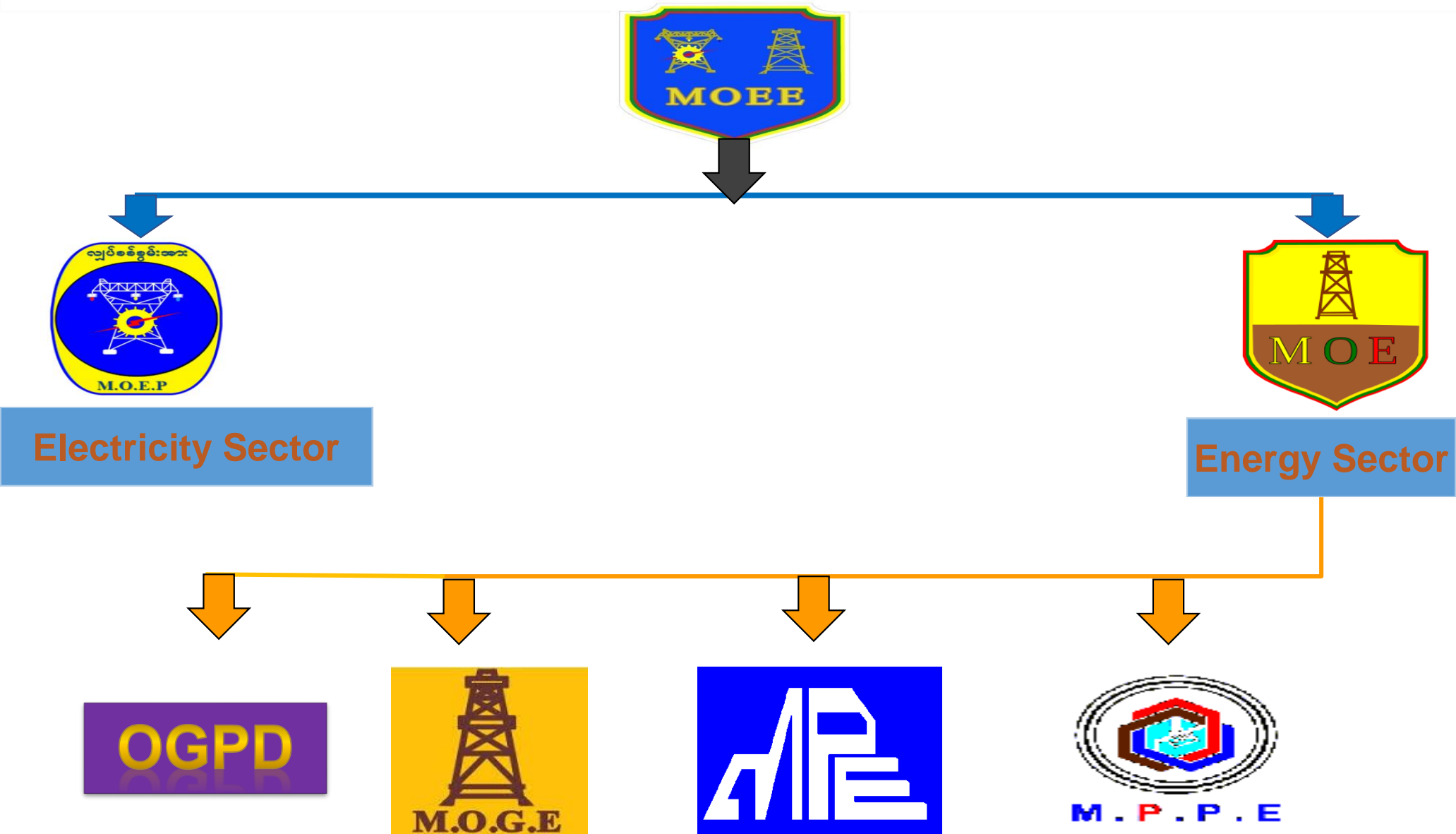
Country's Profile

THE REPUBLIC OF THE UNION OF MYANMAR



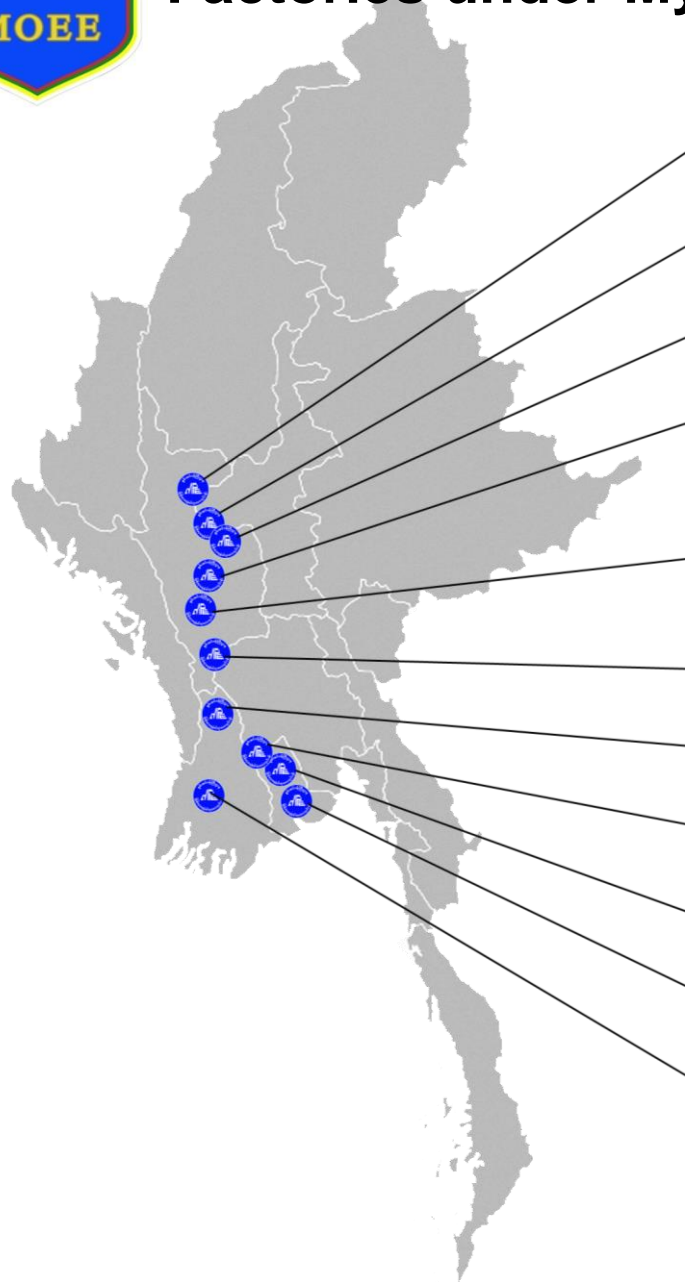
President	: U Win Myint
State Counsellor	: Daw Aung San Suu Kyi
Capital City	: Nay Pyi Taw
Language	: Myanmar
Area	: 676,552 sq km (251,218 sq miles)
Population	: 53 millions
Currency	: Kyat
Climate (seasons)	: Tropical monsoon Climate (Summer, Rainy and Winter)
Border connecting Countries	: Bangladesh, India, China, Laos, Thailand

ORGANIZATION CHART OF MINISTRY OF ELECTRICITY AND ENERGY





Factories under Myanmar Petrochemical Enterprise



**No. (2) Fertilizer Factory (Kyunchaung) &
No. (3) LPG Extraction Plant (Kyunchaung)**

No. (1) Fertilizer Factory (Sa-Le)

No. (2) Refinery (Chauk)

No. (1) LPG Extraction Plant (Minbu)

Petrochemical Complex (Thanbayakan)

No. (3) Fertilizer Factory (Kyawzwa)

Methanol Plant (Seiktha)

No (2) LPG Extraction Plant (Nyaung Don)

No. (4) Fertilizer Factory (Myaungdaga)

No. (1) Refinery (Thanlyin)

No. (5) Fertilizer Factory (Kangyidaunt)

Current Status of Refineries

No(1) Refinery (Thanlyin)



No(2) Refinery (Chauk)



Petrochemical Complex (Thanbayakan)



1963 (COD-B) & 1980 (COD-C)

1954

1982

Design Capacity - 20,000 BPD
Foster Wheeler Co.(England),
Mitsubishi Heavy Industries
Ltd.(Japan)

Design Capacity - 6,000 BPD
Foster Wheeler Co, Ltd.
(England)

Design Capacity - 25,000 BPD
Mitsubishi Heavy Industries
Ltd. (Japan)



Challenges of Refineries



- ❖ Currently, MPE can produce petroleum products only 8% of domestic demand.
- ❖ Imported over 90% of domestic demand per Annum (USD more than 3 Billion)
- ❖ All refineries rest on the availability of local crude oil (about 6,300 bbl per day) and now over 30 - year of ages.
- ❖ All refineries can produce only Regular grade Gasoline (RON 65 ~ 68) & Regular grade Diesel (HSD)
- ❖ Does not meet the local market demand of Premium Gasoline (RON 92 ~ 95) & Premium Diesel (HSD)
- ❖ Need Foreign Direct Investment (FDI) to upgrade the existing Refineries
- ❖ Weak Business competition in Petroleum Industry

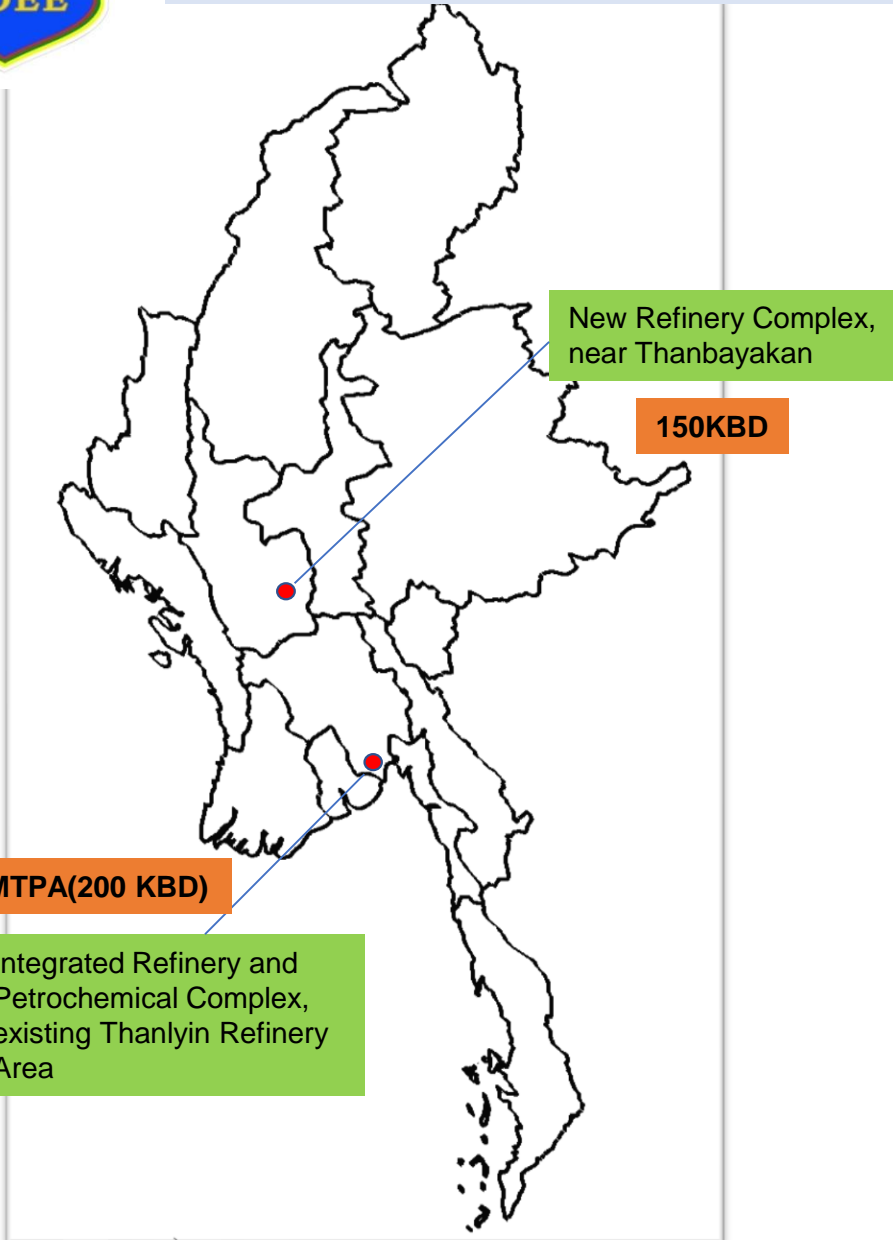


Future Outlook for Refineries



New Refineries

- ❖ Based on the Feasibility Study Result, petroleum products demand will reach 200 KBD around 2025, and could be over 350 KBD in 2035.
- ❖ To construct a new and modernized Refineries with economic viability at existing Thanlyin area and near Thanbayakan location to satisfy the domestic demand for petroleum products with Standard quality.



Current Status of LPG Plants

**No(1) LPG Extraction Plant
(Minbu)**



1986

- Design Capacity
24mmscfd, 99 Ton/day
- Mitsubishi Heavy Industry,
Japan

**No(2) LPG Extraction Plant
(Nyaung Don)**



2005

- Design Capacity
10~16 mmscfd, 43 Ton/day
- CMC Dong Fang Int'l Co.,
Ltd, China

**No(3) LPG Extraction Plant
(Kyunchaung)**



2010

- Design Capacity
8~10 mmscfd, 15 Ton/day
- CMC Dong Fang Int'l Co.,
Ltd, China



Challenges of LPG



- ❖ LPG Market Size is 6,000 MT ~ 7,000 MT/ month in Myanmar and is contributed by Government and Private Sector.
- ❖ MPE produces 800 MT / Month in LPG Extraction Plant (Minbu, Nyaung Don, Thanbayakan) and over 5,200 MT/Month from private sector is imported by Sea Trade and Border Trade.
- ❖ LPG Price is higher than other countries because of only one LPG group by Myanmar - Thai Border Trade and Terminal by Sea Trade.
- ❖ Two operational terminals will be commissioned in 2019~2020.
- ❖ Need Foreign Direct Investment (FDI) for LPG Business



Future Outlook for LPG



❖ Foreign Investors are warmly welcome to implement the following sectors in LPG

Business ;

- Floating Storage Unit (FSI)
- Centralization System for high rise Building and Condominium
- Door to door System for End Users
- Constructing New LPG Plant using LNG which includes suitable composition of C3 & C4
- Converting the Auto Gas System in Vehicles

Current Status of Fertilizer Factories

No(1) Fertilizer Factory
(Sa-Le)



1970

Design Capacity

Ammonia - 120 MT/ day

Urea - 205 MT/ day

Hitachi Zosen, Japan

No(2) Fertilizer Factory
(Kyunchaung)



1971

Design Capacity

Ammonia - 120 MT/day

Urea - 207 MT/day, Pintsch

Bamag Company, Germany

No(3) Fertilizer Factory
(Kyawzwa)



1985

Design Capacity

Ammonia - 360 MT/day

Urea - 600 MT/ day

UHDE GmbH, Germany

Fertilizer Factories (Cont.'s)

No(4) Fertilizer Factory (Myaungdaga)



2010

Ammonia - 325 MT/ day

Urea - 500 MT/ day,

HQCEC, China

No(5) Fertilizer Factory (Kangyidaunt)



2011

Ammonia - 325 MT/ day

Urea - 500 MT/ day,

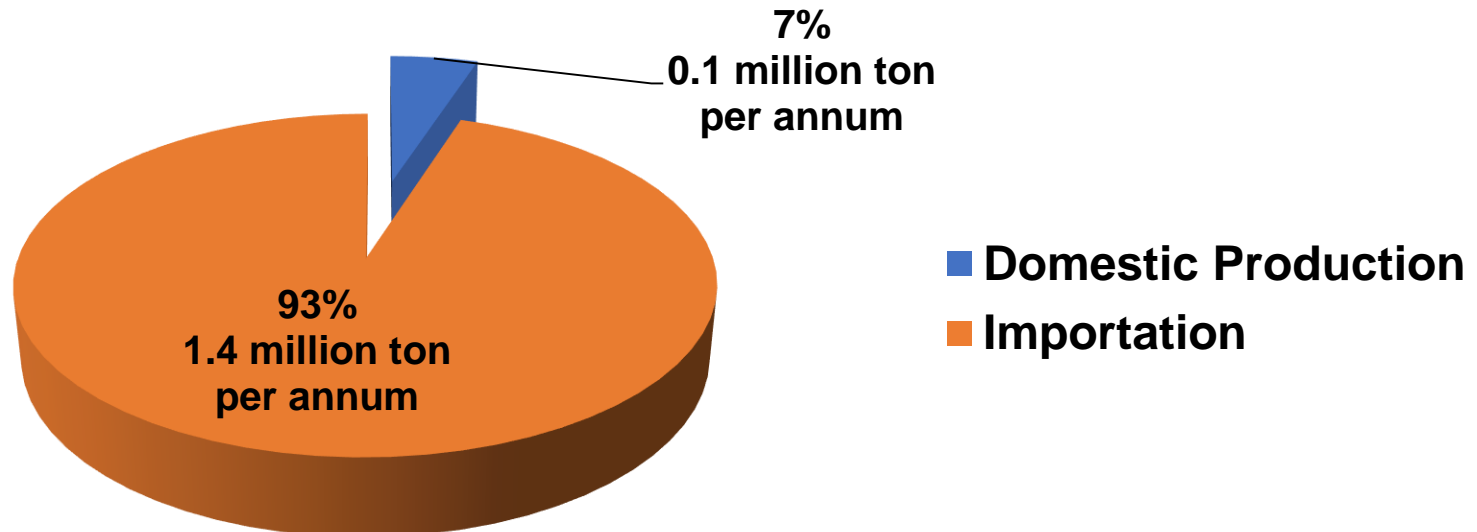
HQCEC, China



Challenges of Fertilizer Factories

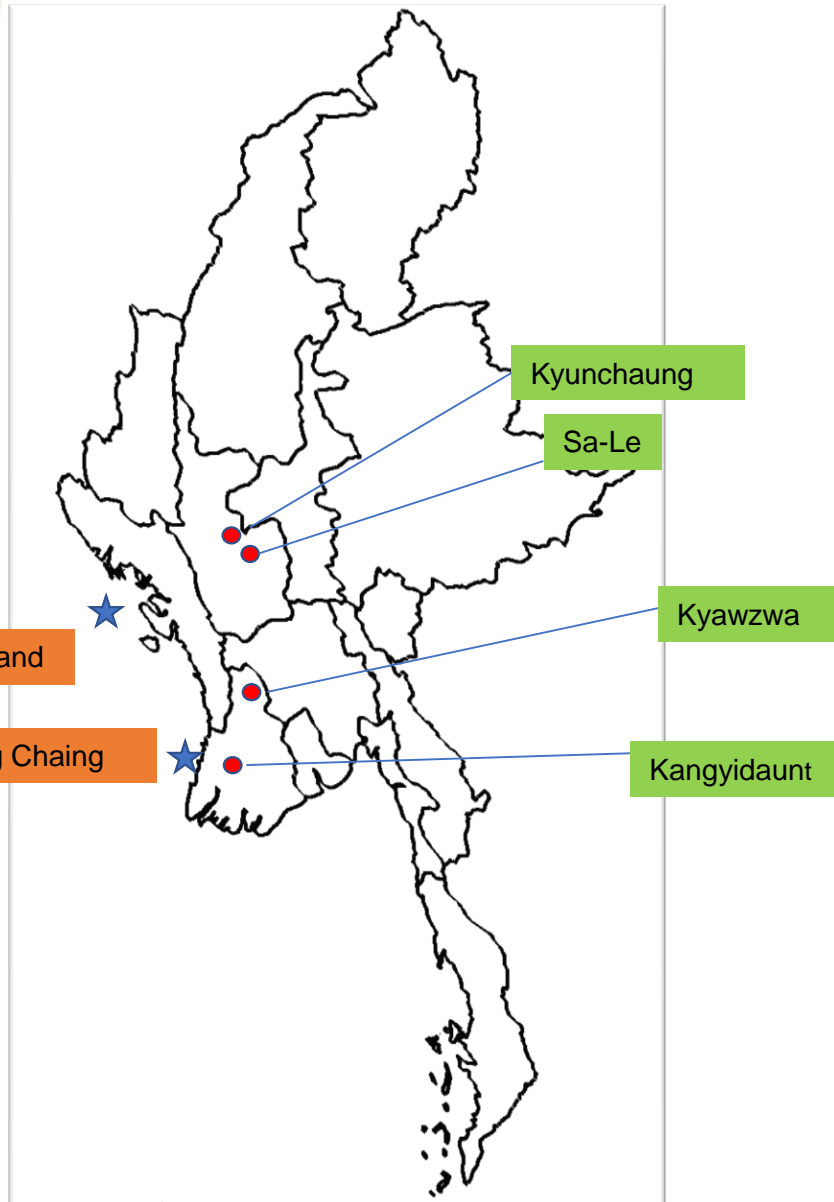


- ❖ Fertilizer demand in Myanmar is increasing significantly year by year the development of Agricultural Sector.
- ❖ Can produce only for 7 % of Local Demand due to the insufficiency of NG and low efficiency of the factories.
- ❖ 93% imported from other countries such as China, Thailand, India and Middle East countries (about USD 360 Million)
- ❖ Upgrading the factories are essentially and urgently required.





Future Outlook for Fertilizer Factories



- ❖ Will invite the Letter of Expression Interest (LoEI) to replace Fertilizer Factories namely Sa-Le, Kyunchaung, Kyawzwa with the new economic viability and modernized Fertilizer Plants using LNG as raw material by Pipeline system from Made Island.
- ❖ Will also invite the Letter of Expression Interest (LoEI) to operate existing No(5) Fertilizer Factory (Kangyidaunt) using LNG as raw material by Pipeline system from Mee Laung Chaing, Ayeyarwaddy Region.

THANK YOU FOR YOUR ATTENTION