



Investment Opportunities on Agri & Livestock Sector In Yangon Region

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Director/Secretary

DICA (Yangon Branch Office)/ YRIC

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YANGON



Heritage. Green. Livable. Commercial Region of Myanmar



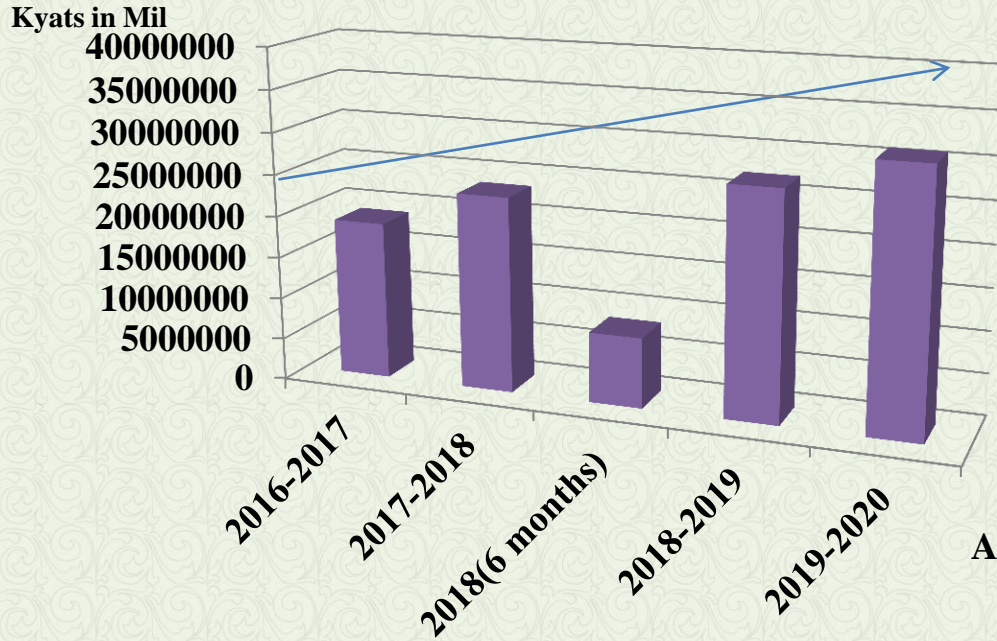
YANGON ACCOUNTS FOR

- CLOSE TO 85 % OF THE COUNTRY'S TRADE
- OVER **HALF** OF THE TOTAL INVESTMENTS INTO THE COUNTRY

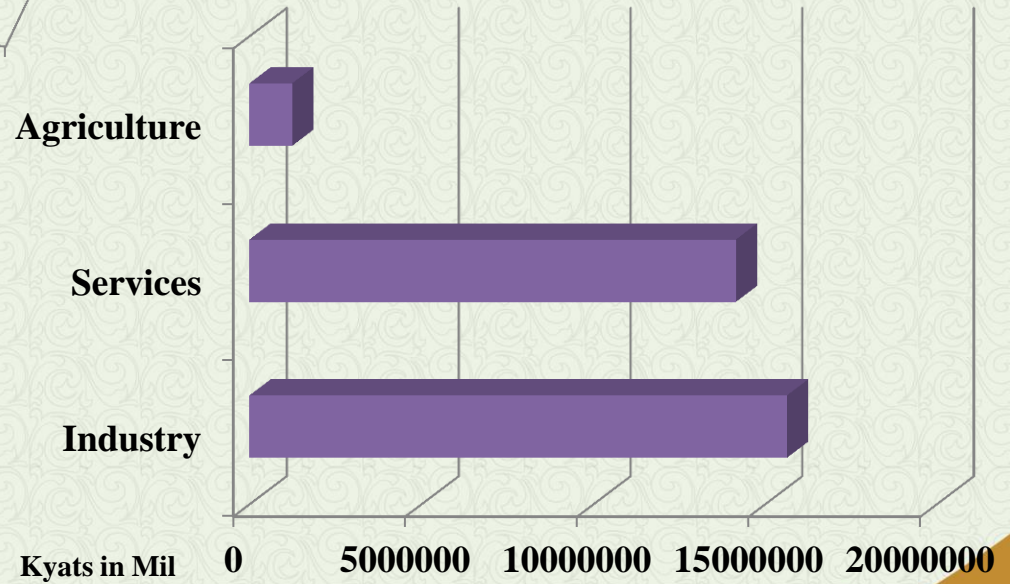


GDP per Capita

- Yangon City
Area (794km²),
Population (5.74mil.)
- Greater Yangon
Area (1,500km²)
Population (6.4mil.)
- Yangon Region
Area (10,170km²),
Population (7.4mil.)



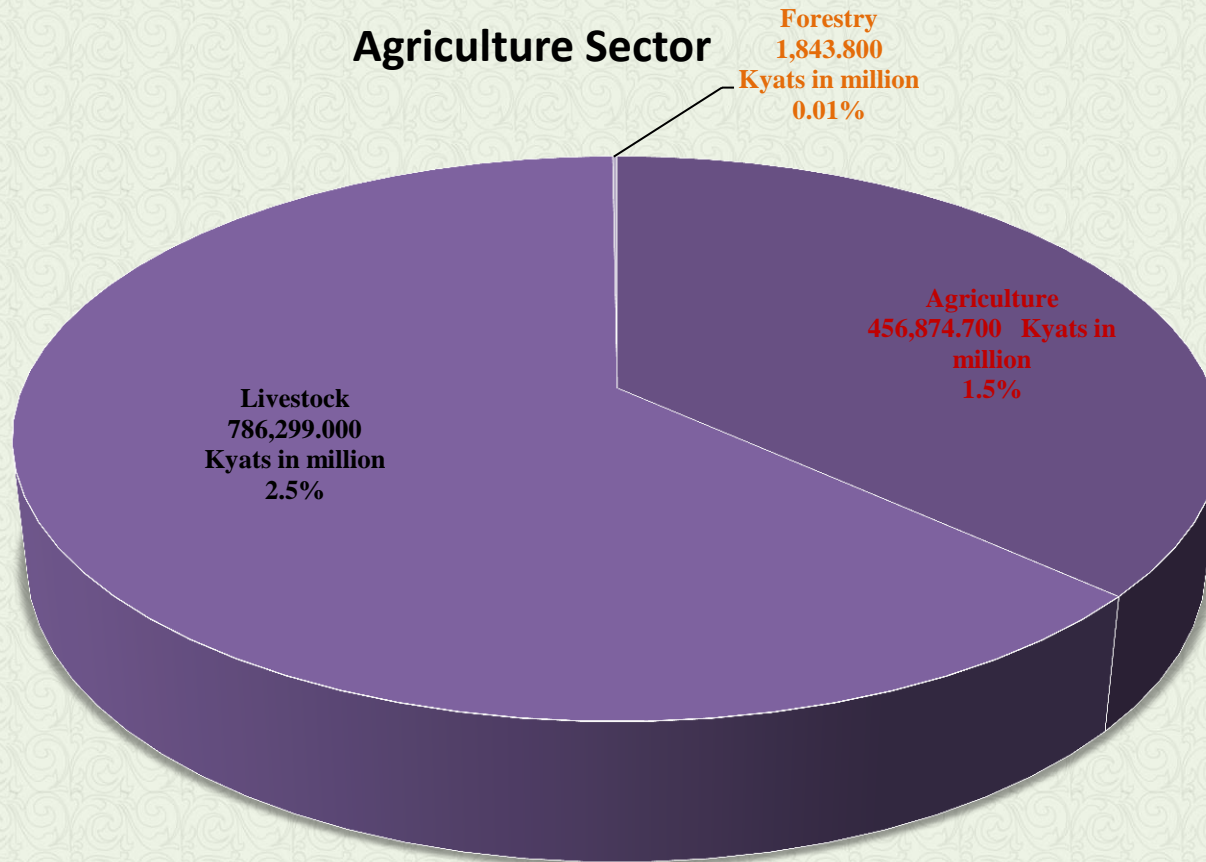
GDP Composition by economic sector



Source: Citizen's Budget of Yangon Region



Agriculture Sector





Agri & Livestock Potentials of Yangon

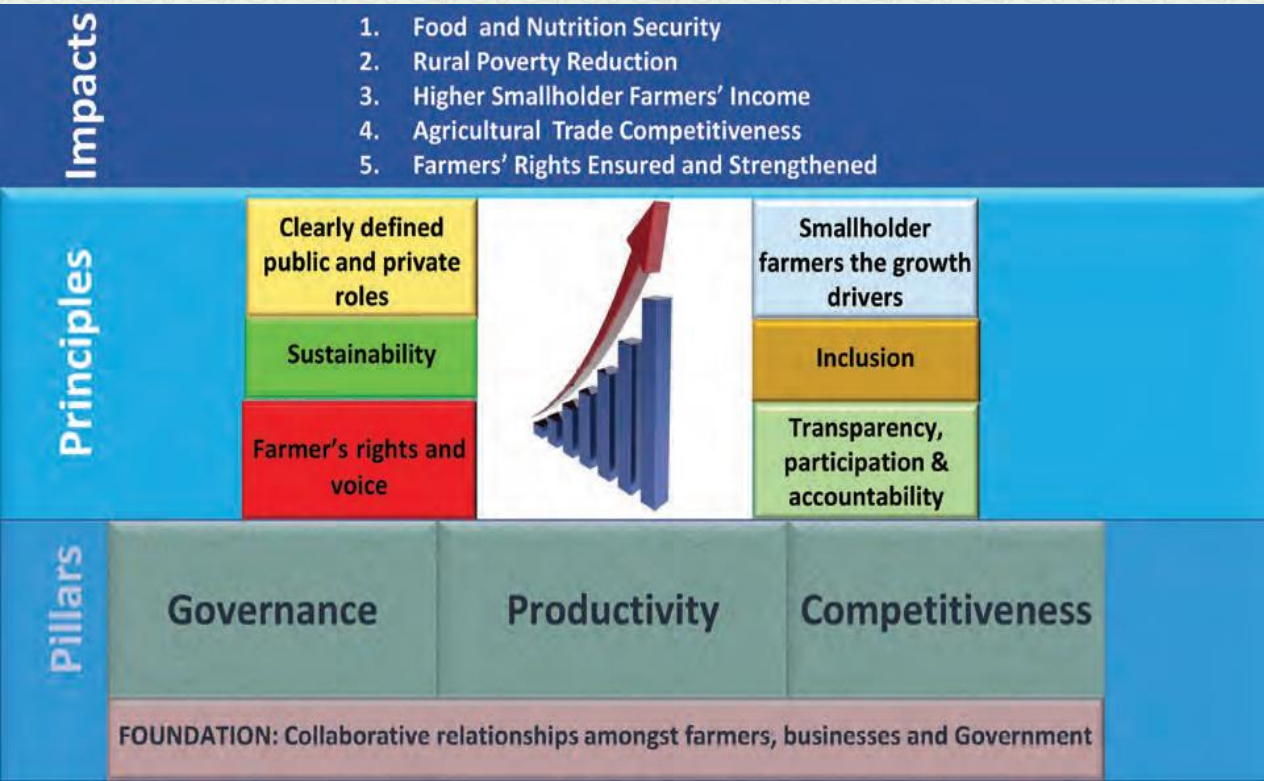
- Yangon – the most vibrant commercial capital of Myanmar with about 7 million consumer base
- Strategic location – the most important overseas gateway, the most successful Industrial Zones in Myanmar are located in Yangon (including Thilawar SEZ and other emerging International Industrial Zones)
- Distribution Hub – the epicenter of domestic trade for Upper and Lower Myanmar
- Yangon – the seat of Myanmar Investment Commission and DICA to support and assist Local and Foreign Investment
- Reasonably large size of agricultural land areas in outskirts of Yangon, over 1 million cultivation acres for agricultural purposes



The vision statement of the agriculture policy

“by 2030, Myanmar achieves inclusive, competitive, food and nutrition secure, climate change resilient, and sustainable agricultural system contributing to the socio-economic well-being of farmers and rural people and further development of the national economy”.

Ministry of Agriculture, Livestock and Irrigation



MYANMAR AGRICULTURE DEVELOPMENT STRATEGY AND INVESTMENT PLAN (2018-19 ~ 2022-23)

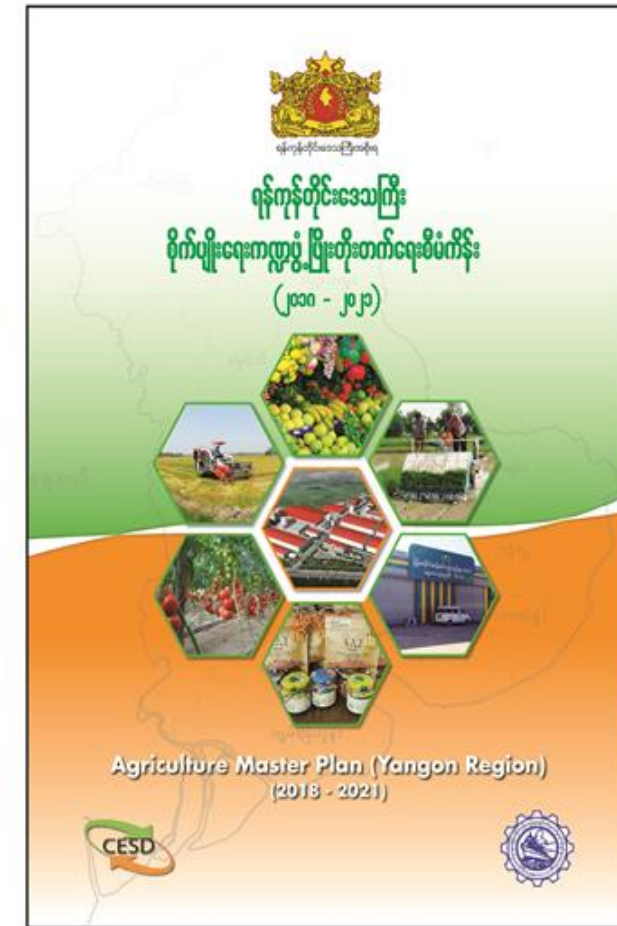
Strategic Framework of the Agricultural Development Strategy

Agriculture Master Plan for Yangon Region (2018–2021)



“Yangon Region Agriculture Master Plan will promote not only for the benefits of stakeholders and actors in the agricultural supply and value chains but also for the consumers’ access to safe food at affordable prices. Besides, green growth and environmental aspects are included as a key part of our Master Plan to ensure sustainability. Yangon Region Agriculture Master Plan will foster more investment and will pave a way for private sector-led, market driven, government-facilitated agriculture sector development”

H.E. U Phyo Min Thein



Agriculture Master Plan for Yang Region (2018–2021) has been laid down as the consequence of Public Private Partnership between Yangon Region Government and UMFCCL. The Plan is in line with Myanmar Sustainable Development Plan – MSDP and other policies, plans and strategies of Union Government for the development of agriculture sector.

Modernizing Yangon Region's Agricultural Sector



Pillar 1



Modernizing Farm Production

- access to technical and economic information
 - Invest in infrastructure
 - Promote adoption of mechanization
 - Innovate and build organizational and human capacity of government agricultural institutions
- 

Pillar 2

Modernizing Input Markets

- Provide farmers with greater land tenure security
- liberalize and invigorate Myanmar's seed, fertilizer
- Create an enabling environment for provision of a full range of financial services by the private sector
- efficient and sustainable use of natural resources
- rural labor shortages

Pillar 3

Modernizing Output Markets and Supply chains

- Invest in supply chain infrastructure
- Promote sustainable natural resource governance for capture fisheries
- Improve the business environment
- Promote domestic and foreign direct investment
- Protect intellectual property rights
- Liberalize and facilitate imports and exports



“Yangon Region” : Investment Hub in Myanmar





Mission

To Attain Green Growth Economy of Yangon Region by Promoting Responsible and Quality Investment



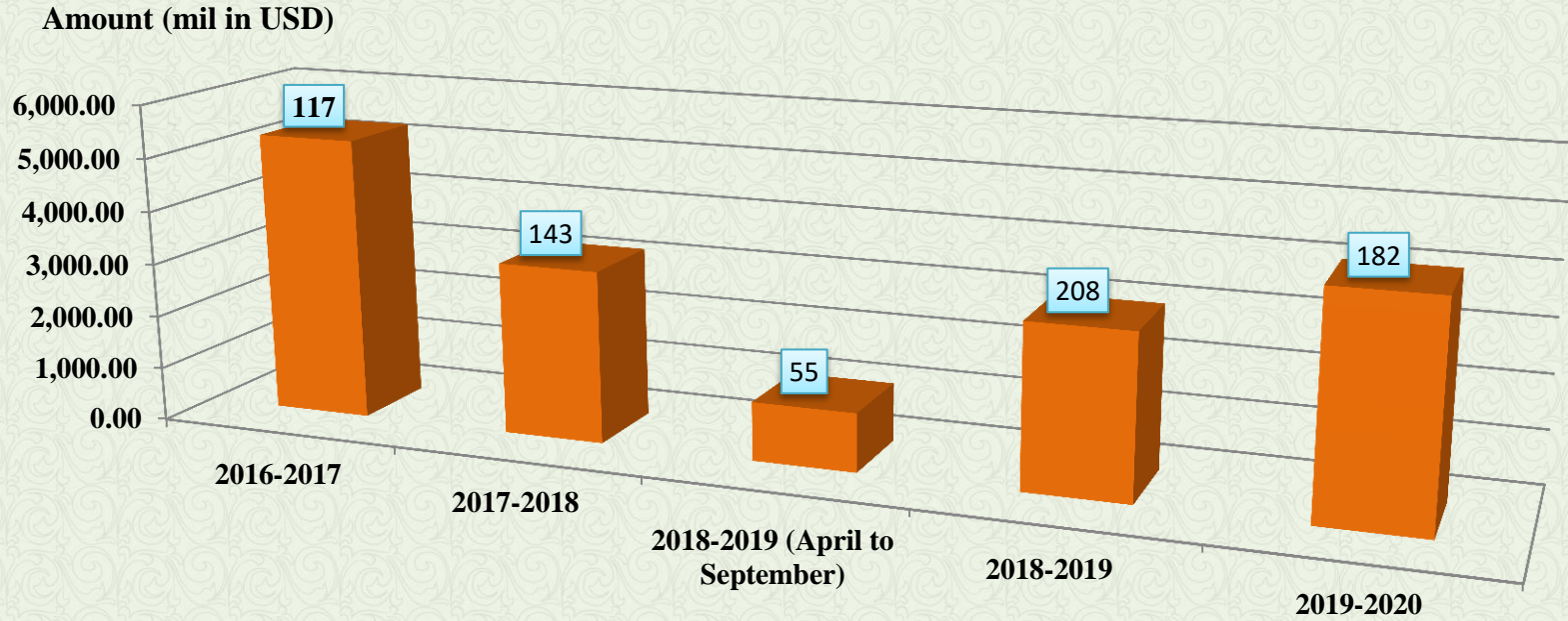


Permitted Enterprises of Foreign Investment by year in Yangon Region from 2016-2017 to 2019-2020

No	Year	No of Enterprises	Amount (mil in USD)
1	2016-2017	117	5,296.831*
2	2017-2018	143	3,221.994*
3	2018-2019 (April to September)	55	1,094.782*
4	2018-2019	208	3,034.493*
5	2019-2020	182	4,071.723*
Total		705	16,719.823 *



Permitted Enterprises of Foreign Investment by year in Yangon Region from 2016-2017 to 2019-2020





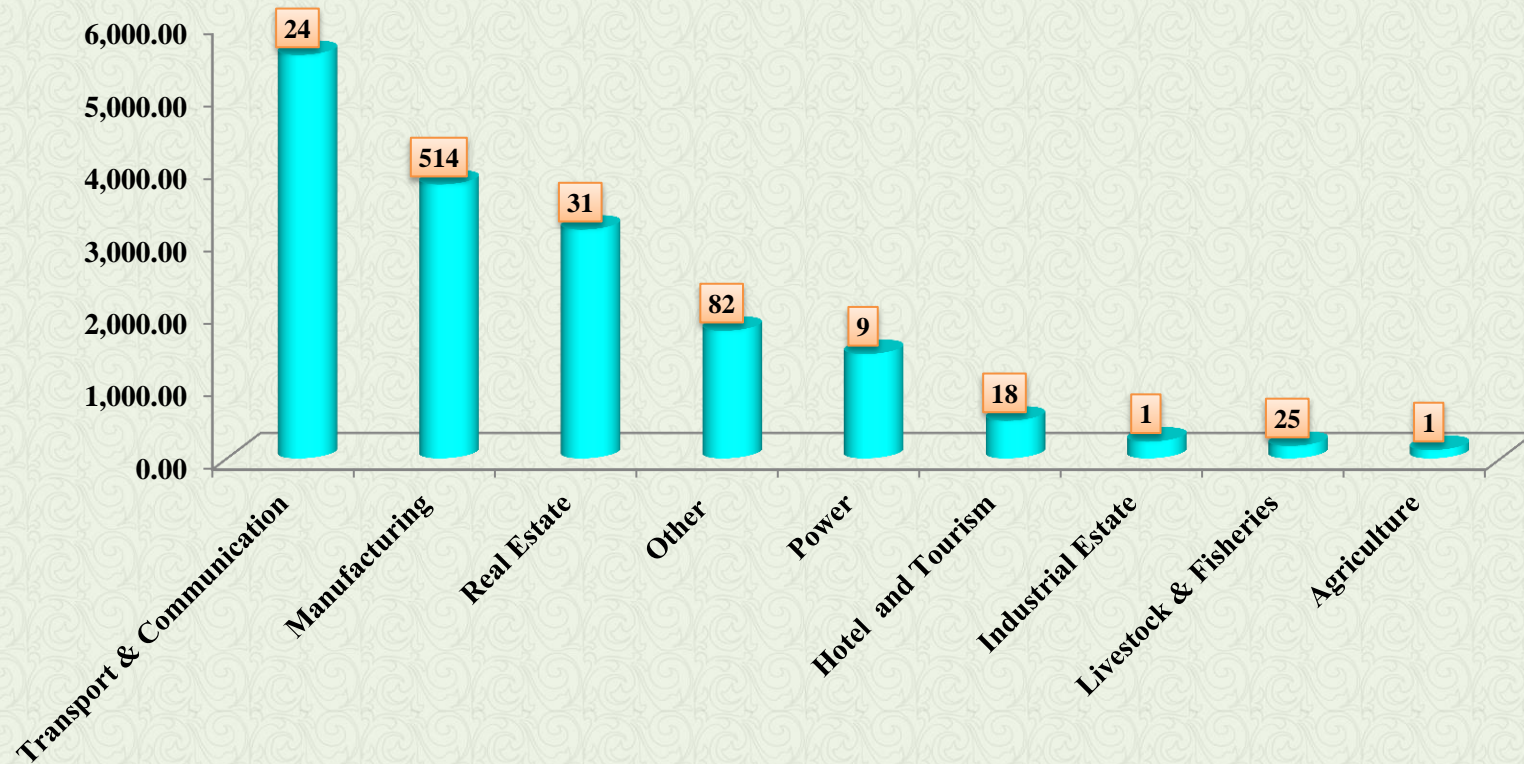
Permitted Enterprises of Foreign Investment by Sector in Yangon Region from 2016-2017 to 2019-2020

No	Sector	No of Enterprises	Amount (mil in USD)
1	Livestock & Fisheries	25	171.037*
2	Manufacturing	514	3,775.462*
3	Power	9	1,438.343*
4	Transport & Communication	24	5,559.820*
5	Hotel and Tourism	18	518.534*
6	Real Estate	31	3,152.754*
7	Industrial Estate	1	230.600*
8	Other	82	1,758.273*
9	Agriculture	1	115.000
Total		705	16,719.823



Permitted Enterprises of Foreign Investment by Sector in Yangon Region from 2016-2017 to 2019-2020

Amount (mil in USD)





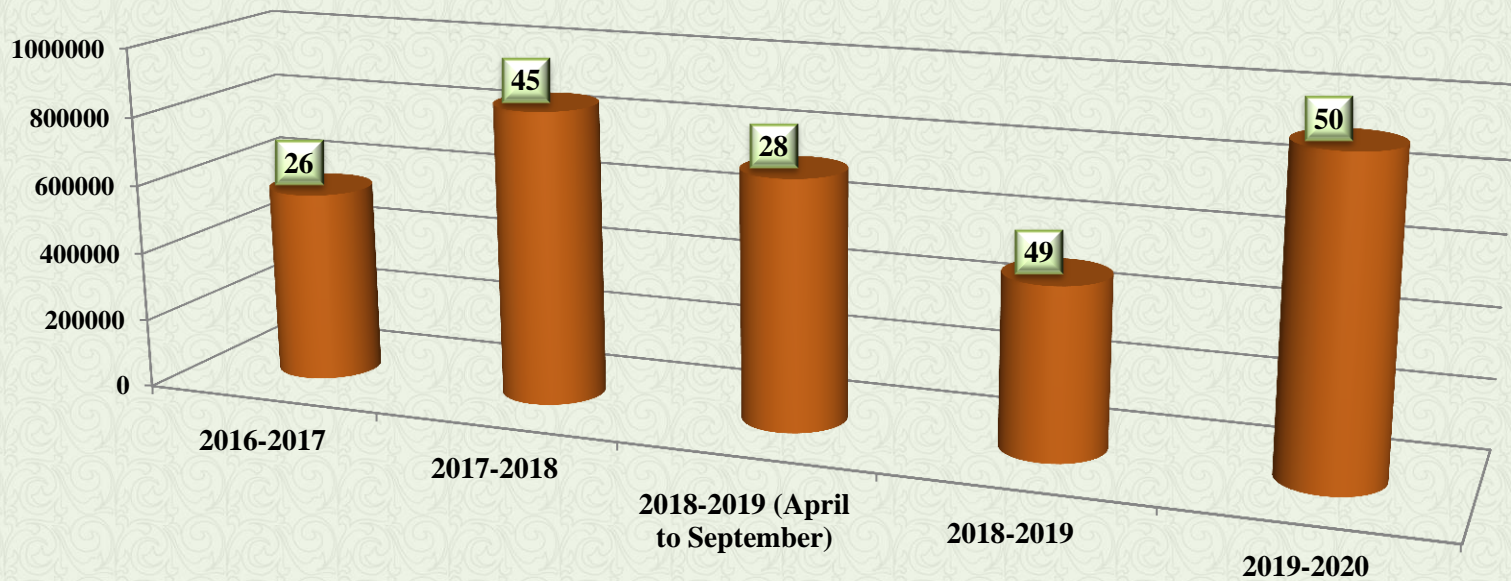
Permitted Enterprises of Myanmar Citizen by year in Yangon Region from 2016-2017 to 2019-2020

No	Year	No of Enterprises	Amount (Kyats in Million)
1	2016-2017	26	555,531.053*
2	2017-2018	45	851,639.370*
3	2018-2019 (April to September)	28	718,642.379*
4	2018-2019	49	489,663.276*
5	2019-2020	50	901,499.384*
Total		198	3,516,975.462*



Permitted Enterprises of Myanmar Citizen by year in Yangon Region from 2016-2017 to 2019-2020

Amount (Kyats in Million)



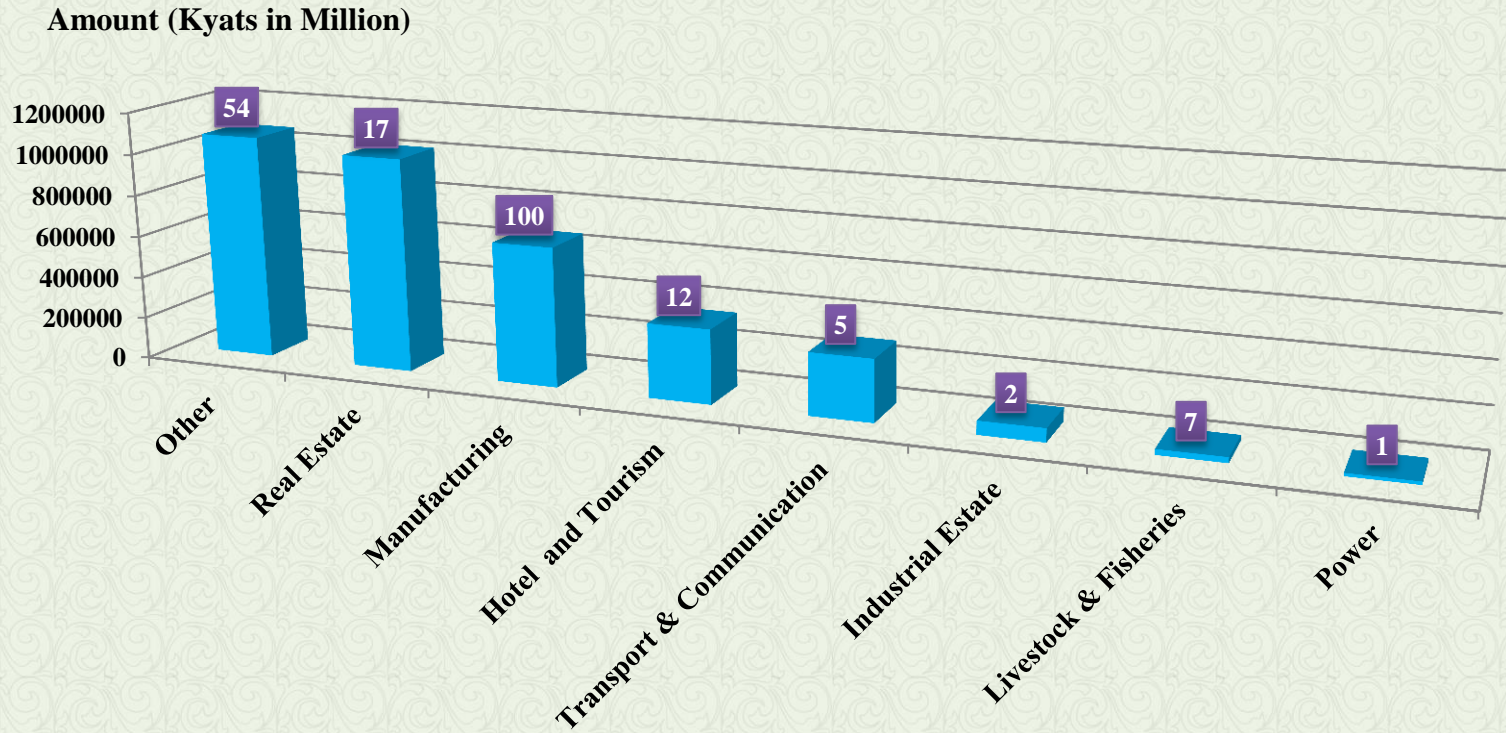


Permitted Enterprises of Myanmar Citizen Investment by Sector in Yangon Region from 2016-2017 to 2019-2020

No	Sector	No of Enterprises	Amount (Kyats in Million)
1	Other	54	1,074,540.936
2	Real Estate	17	1,022,876.194
3	Manufacturing	100	665,257.915
4	Hotel and Tourism	12	353,058.613
5	Transport & Communication	5	294,889.264
6	Industrial Estate	2	65,052.660
7	Livestock & Fisheries	7	26,490.586
8	Power	1	14,809.294
Total		198	3,516,975.462



Permitted Enterprises of Myanmar Citizen Investment by Sector in Yangon Region from 2016-2017 to 2019-2020

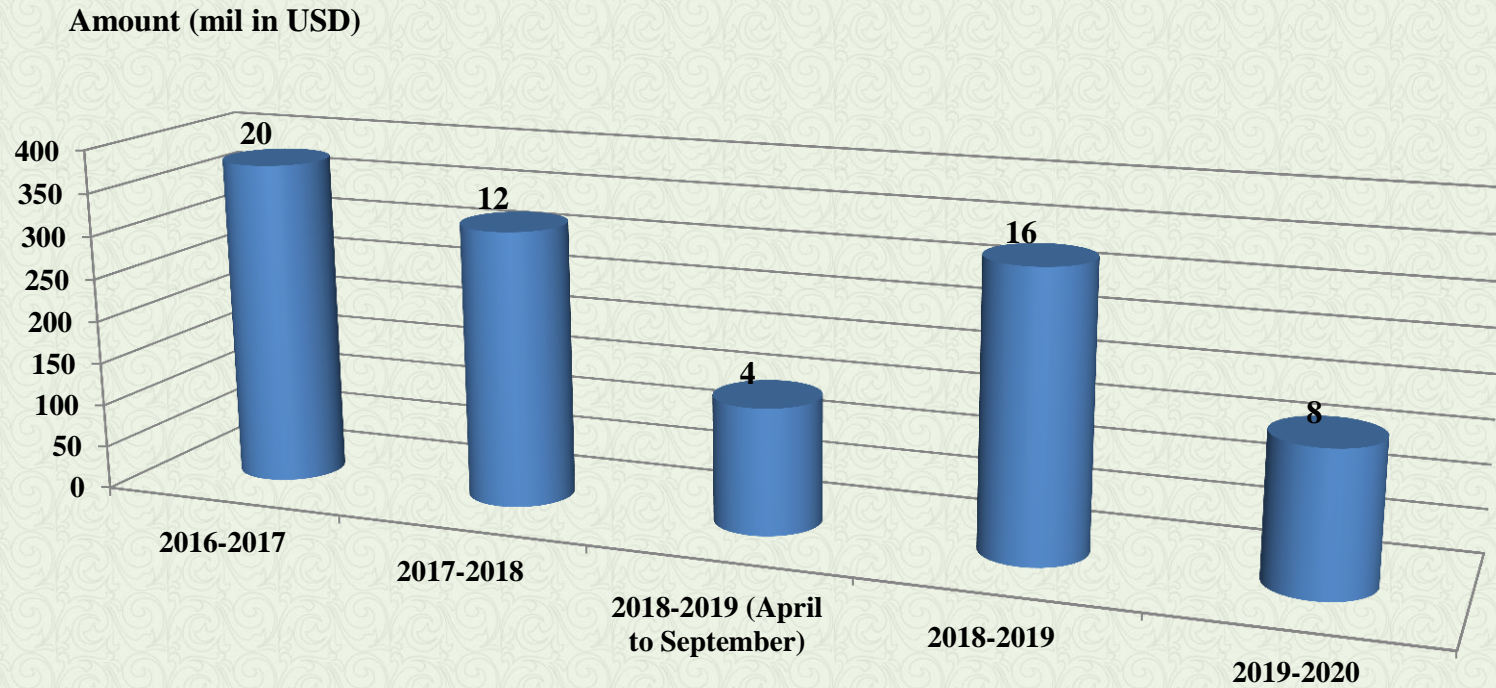




Permitted Enterprises of Thilawa Special Economic Zone (by year)

No	Year	No of Enterprises	Amount (mil in USD)
1	2016-2017	20	376.786
2	2017-2018	12	320.380
3	2018-2019 (April to September)	4	146.000
4	2018-2019	16	326.44
5	2019-2020	8	163.051
Total		60	1,332.657

Permitted Enterprises of Thilawa Special Economic Zone (by year)



Industrial Zones in Yangon



Industrial Zones

- 65% of Myanmar's industrial estates
- Upgrading the existing 29 industrial zones
- Develop another 11 industrial zones at the outskirts



Port:

- Yangon Main Port capacity < 1,000,000 TEUs
- Thilawa Area Port capacity of 800,000 TEUs
- 2030 forecast to exceed 4,000,000 TEUs
- Multi Terminal Port at Elephant Point and Kawhmu River Port

Airport:

- YIA capacity of 6 million passengers - increasing to 20 million
- Air traffic demand in Myanmar forecast to reach 42 million passengers in 2040
- Kungyangon (Yangon) and Hanthawaddy (80km from Downtown Yangon)

Ports and Airports

Yangon Public Transportation



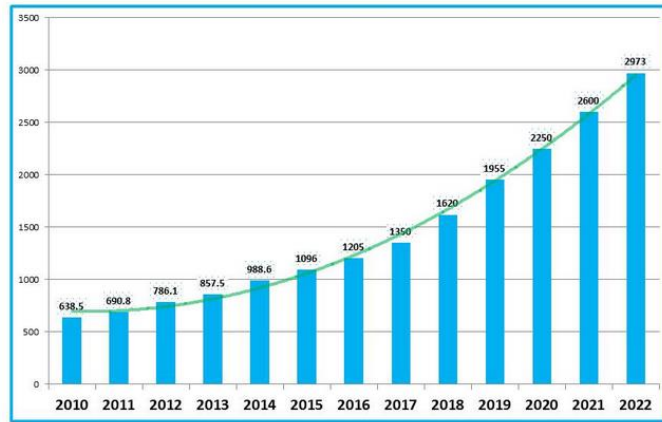
Three main areas

- Strengthening road maintenance
- Improvement, facilitating public transport development
- Enhancing traffic management

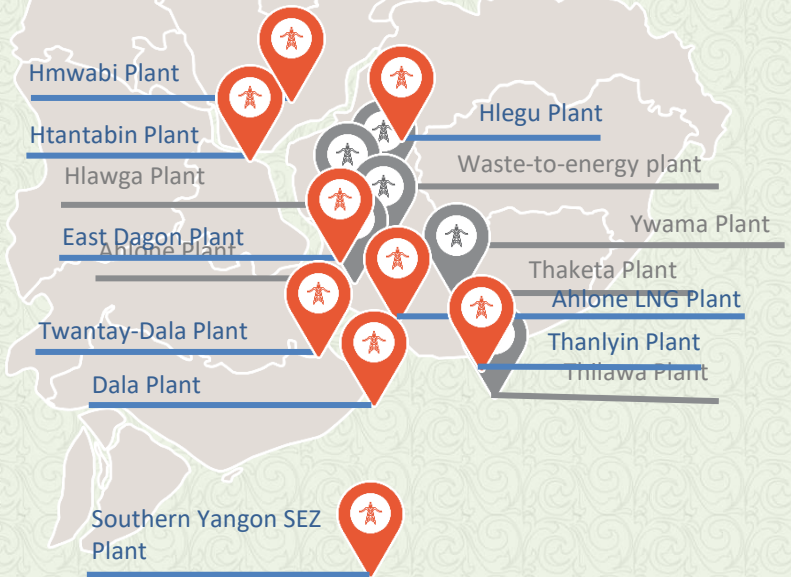
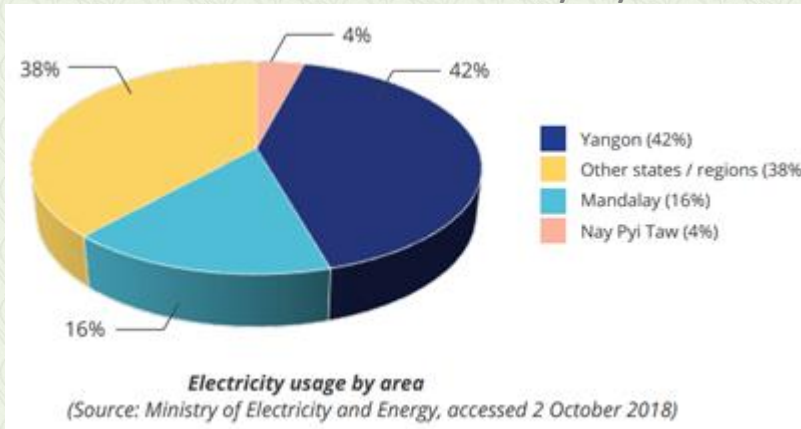




Annually increased Peak Load Condition in Yangon Region

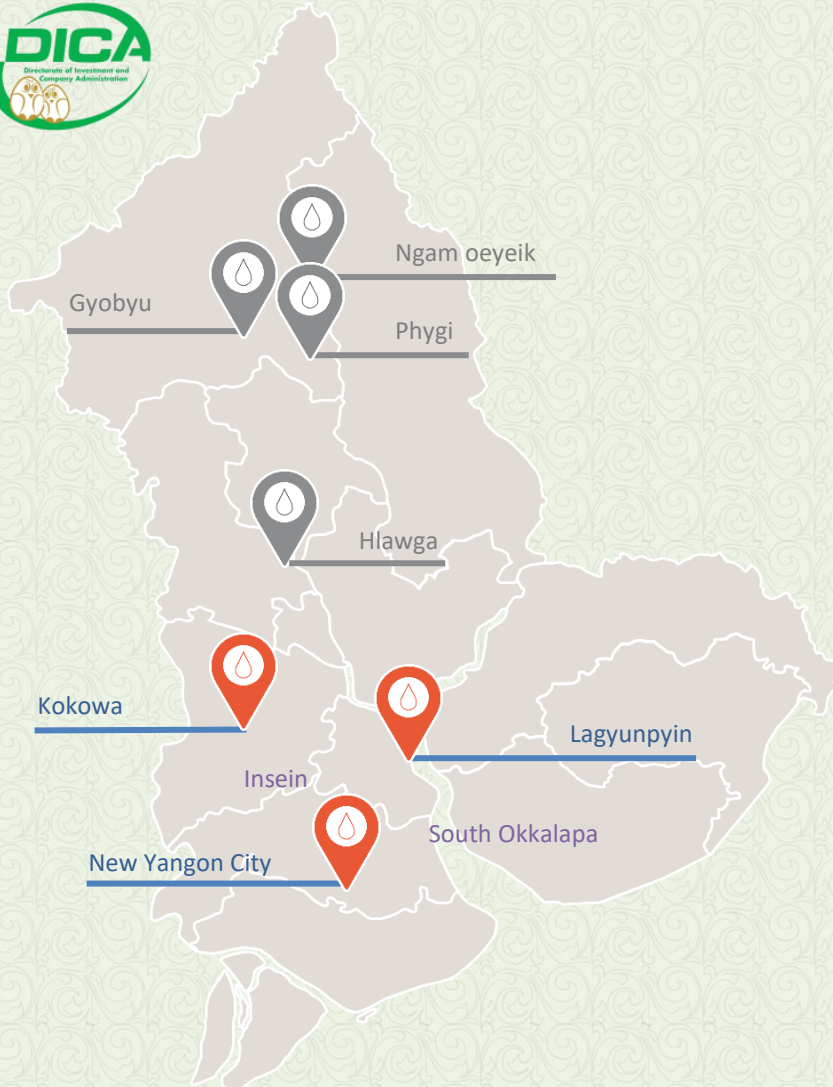


- Household 1,583,025
- Supplied Household 1,281,440
- Electrification rate 80.94%
- Annual electricity 852 kWh (2016-17) (Consumption per Capital)
- Need additional 3,000MW of electricity by 2022



- Plans to develop 11 power projects to generate 4,740MW between 2018 - 2040

Power



- **Currently 201 million gallons of water a day supplied**
- **Currently 60% NRW in Yangon**
- **The Kokkowa Water Distribution Project started in 2018, will begin distributing water in 2025**
- **The Lagoon Pyin Water Distribution Project started in May 2013 is expected to be completed by October 2022.**
- **Plans to pumps 610 million gallons of water in 2040, reaching 80pc of the city's total area, while reducing non-revenue water to 15pc of the total supply.**

Existing Projects

Proposed/Opportunity

Water



Investment Priority on Agrifood Sectors



Mechanization, seed, fertilizer (and other agro-chemicals), and equipment markets

- mechanization of land preparation, seeding, and transplanting, as well as harvesting



Supply Chain Infrastructure

- wholesale market infrastructure (design of stalls, energy needs, waste management, logistics facilities), Mega food park, Agri SME Zone, abattoirs, cold storage, cold chain transport, irrigation, rural roads, rural electrification and internet

Investment Priority on Agrifood Sectors



Financial services to rural-based individuals, farms, and rural enterprises - banks, microfinance institutions (MFIs), non-bank financial institutions, such as leasing and finance companies, and insurance companies to provide needed services to rural communities, especially farmers and SMEs



Meat, dairy and fisheries industries

Agricultural Sector Development Projects in Yangon

According to the Yangon Region Agricultural Sector Development Project Master Plan (2018 to 2021), the Regional Government will implement **total (22) agricultural development projects** with a **total investment of 222 million USD** by the private sector. Most of the projects are related to rice sector developments such as rice seed production, high quality rice mills, by-products industries, value-added rice manufacturing industries, storage facilities, loading and unloading jetty.





Agricultural Services Centers

(To enhance agricultural mechanization and reduce post harvest losses)



**Project in Twentay, Kawhmu and Thongwa townships.
The investment for each project is total 10 million usd.**

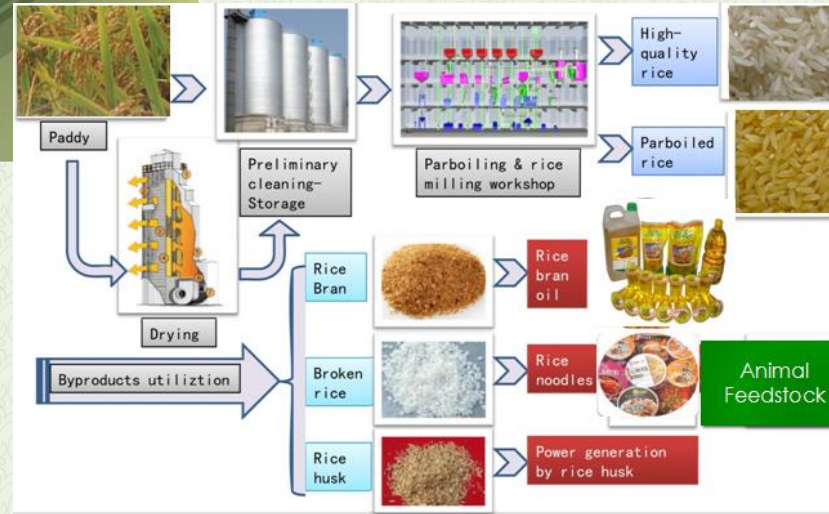


Integrated Rice Complex Project

(to establish a unique introduction of multi-dimensional, multi-faceted value addition to rice production and rice value chain)



**Project in Twentay township.
The investment for this project is total 30 million usd.**



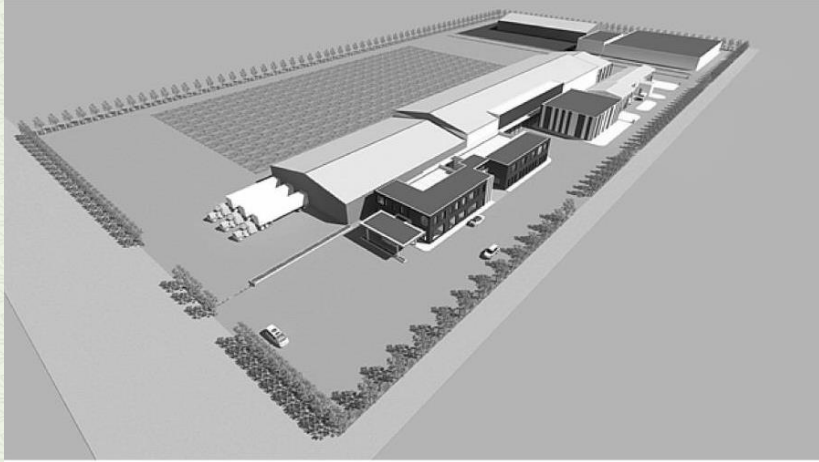


Golden Lace Daewoo Rice Mill Project

(An RPC is a facility that carries out processing procedures from airing, storing, polishing to inspection and sales.)



Posco International launched grain business in Myanmar in 2017 by acquiring an RPC in Shwe Lin Ban industrial zone in Yangon with 15,000 ton annual capacity. It completed construction of its second RPC this year with 86,000 tons of annual capacity in Twante logistics base that connects Ayeyawady granary and Yangon export port, increasing total capacity of its processing facilities to 100,000 tons.



Gaia Biosecurity Pig Farm & Gaia Quality Meat



Minced meat, Meat balls, Burger patties



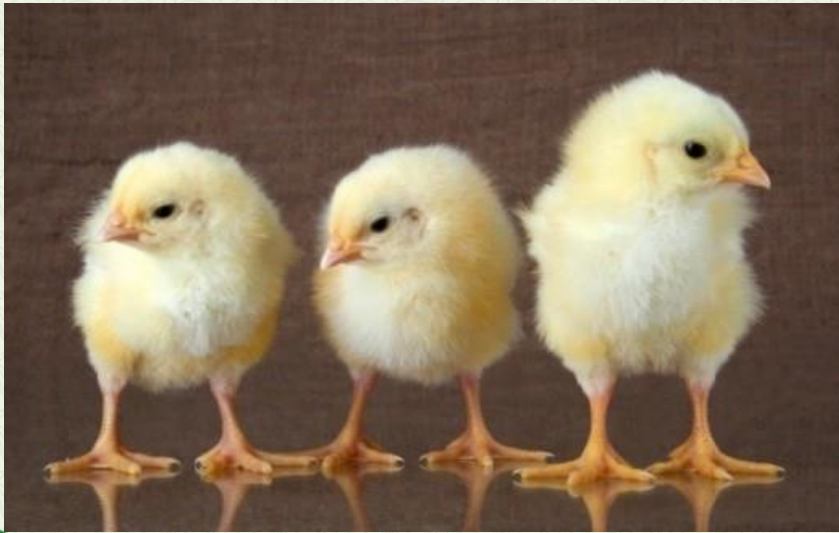
Sliced, Diced, Marinated products



Primal cuts in boxes



Bel Ga Hatcheries



Bel Ga was established in 2017 in Myanmar, specialized in producing Day Old Chickens and Day Old Layers for Myanmar farmers.

fast-growing poultry market



A facility of Japfa Comfeed Myanmar in Myaung Dagar Industrial Zone

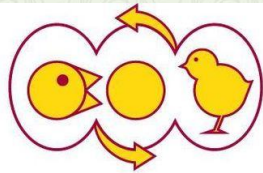
MYANMAR

- 2 poultry feedmills
- 2 poultry breeding farms
- 2 hatcheries
- Over 120 company farms
- Over 80 contract farms





JOHN DEERE



BEL GA LTD



Sunjin

Excerpt of International Agri-related Brands in Yangon



Yangon Region Investment Committee



- **Responsibilities**
 - ✓ **Approve the endorsement permits**
 - ✓ **Provide necessary assistance to business communities**
 - ✓ **Facilitate and harmonizes business activities**
 - ✓ **Monitor the progresses of implementing investment activities**



AN OVERVIEW OF THE APPLICATION PROCEDURE FOR ENDORSEMENT

Investors can apply to the Yangon Region investment committee for an Endorsement of an investment proposal. The following procedure is valid for most kinds of investment applications. The process might slightly vary depending on the type of investment.

- **STAGE 1: INQUIRE INFORMATION FROM DICA (Yangon Branch office)**
Seek advice and request information from DICA Yangon Branch office
- **STAGE 2: PREPARING THE APPLICATION DOCUMENTS**
Buy Endorsement Application form then fill in forms and submit to the Yangon Region investment committee office
- **STAGE 3: REVIEW BY THE DICA (Yangon Branch office)**
- **STAGE 4: REVIEW BY THE YANGON REGION INVESTMENT COMMITTEE**
Attend the meeting and give the presentation
- **STAGE 5: OBTAINING RESULTS**
Received the decision of committee, if accepted Pick-up the investment Endorsement



Designation of Development Zone (Notification 10/2017)



Zone 2

moderate
5 years
13 townships

Zone 3

developed
3 years
32 townships

Zone (3) Developed Zones

Yangon (East) District

- 1 Botataung Township
- 2 North Okkalapa Township
- 3 Pazundaung Township
- 4 South Okkalapa Township
- 5 Thingangyun Township
- 6 Yankin Township
- 7 Dawbon Township
- 8 Mingalar Taungnyunt Township
- 9 Tamwe Township
- 10 Thaketa Township
- 11 East Dagon Township
- 12 North Dagon Township
- 13 Dagon Seikkan Township
- 14 Mingaladon Township
- 15 Shwepyitha Township
- 16 Hlaingthaya Township
- 17 South Dagon Township

Yangon(North) District

- 18 Insein Township
- 19 Htantabin Township

Yangon(West) District

- 20 Hlaing Township
- 21 Kamayut Township
- 22 Mayangon Township
- 23 Ahlon Township
- 24 Bahan Township
- 25 Dagon Township
- 26 Kyauktada Township
- 27 Kyimyindaing Township
- 28 Lanmadaw Township
- 29 Latha Township
- 30 Pabedan Township
- 31 Sanchaung Township
- 32 Seikkan Township

Zone (2) Moderate Developed Zones

Yangon(South) District

- 1 Kyauktan Township
- 2 Dala Township
- 3 Seikgyi Kanaungto Township
- 4 Kawmu Township
- 5 Kayan Township
- 6 Kungyangon Township
- 7 Thongwa Township
- 8 Twante Township
- 9 Cocokyun Township

Yangon(North) District

- 10 Hlegu Township
- 11 Taikgyi Township
- 12 Hmawbi Township

Yangon (East) District

- 13 Thanlyin Township



*“Thank
You”*

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