



# **The Current Status and Future Vision of Oil and Gas Sector in Myanmar**

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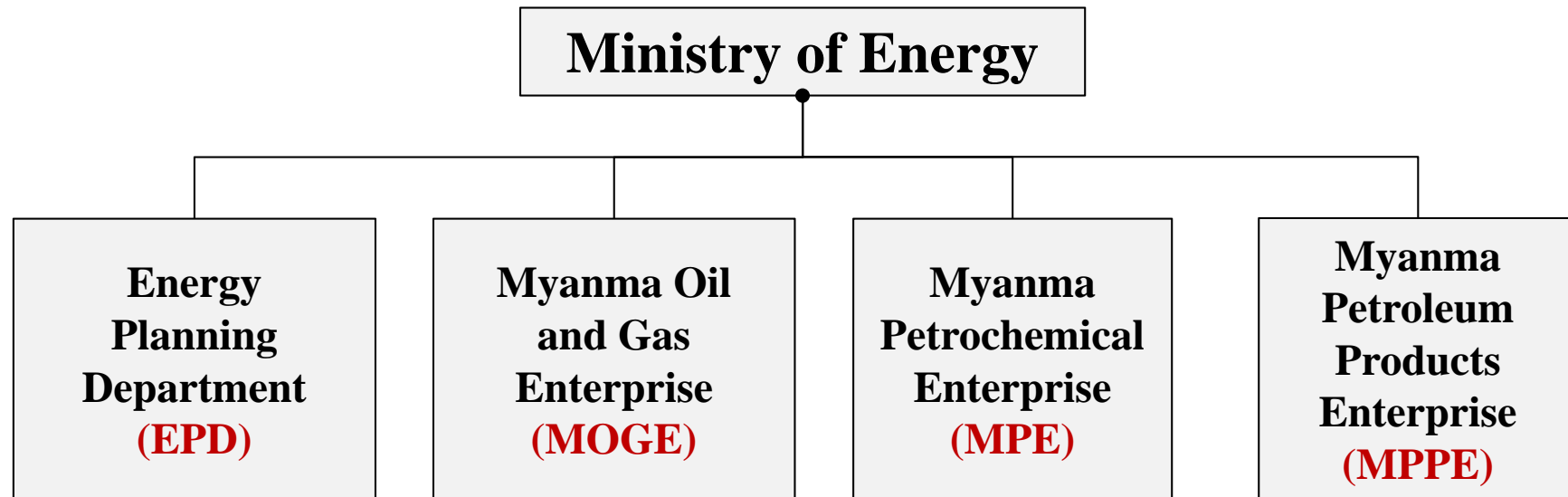
# **Institutional Frameworks in Renewable and Non Renewable Energy Sectors**

- |  |  |
|--|--|
| (1) <b>Ministry of Energy (MOE)</b>                                | = <b>Petroleum, Oil Shale &amp; Fertilizer</b>                                 |
| (2) Ministry of Electric Power<br>Thermal Electric-power, Coal and | = Hydropower Generating,<br>Gas Turbine Power<br>transmission and distribution |
| (3) Ministry of Mines  | = Coal   |
| (4) Ministry of Environmental<br>Conservation & Forestry           | } = Biomass & Fuel Wood  |
| (5) Ministry of Agriculture & Irrigation                           |  |
| (6) Ministry of Science & Technology                               | = Renewable Energy   |
| (7) Ministry of Industry   | = Energy Efficiency  |

**\* Ministry of Energy is Focal Point for Myanmar Energy Sector Cooperation with International and Regional organizations.**

# Ministry of Energy

Organizations and Respective Responsibilities



- Coordination
- Management
- Regulation

- Exploration
- Drilling
- Production
- Onland Oil and Gas Pipeline Network
- CNG

- Refineries & Process
- Fertilizer Plants
- Methanol Plant
- CO2 and LPG Plants
- Waxing & Tar

- Marketing
- Distribution

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## **To Secure Our Own Energy for Future**

- ❑ To integrate all types of Energy Sectors, Renewable Energy and Non Renewable Energy
- ❑ National Energy Management Committee (NEMC) and Energy development Committee (EDC) were formed by President Office dated on 9th January 2013
- ❑ NEMC, Vital Task, to compile Integrate Energy Policy for future program, short terms and long terms
- ❑ The 3<sup>rd</sup> draft of Working Paper for Myanmar Energy Sector Policy in progress

# National Energy Management Committee (NEMC)

- Formed on *9th January 2013*
- Patron - Vice President (2)
- Chairman - Union Minister for Energy
- Vice Chairman - Union Minister for Electric Power
- Members - Ministers from Agriculture, Forest, Mines, National Planning, Industries and representatives from NGO's Renewable Energy Organizations
- Secretary - Deputy Minister for Energy
- Joint Secretary - Deputy Minister for Electric Power

\*\*\* Highlighted duties and functions as:-

- To formulate National Energy Policy and Energy Regulation
- To encourage private sectors in Energy Development
- To plan short terms to fulfill requirements
- To portrait long term plans to generate electricity by coal with CCT and to meet domestic demands
- To develop three sectors: energy, industrial and electrical
- To adopt National Energy Security Strategy and so on!

# Energy Development Committee (EDC)

- Chairman - Union Minister for Energy
- Members - Ministers, Dy. Minister, High authorities personnel from Agriculture, Energy, Forest, Mines, National Planning and Industries and former retired expertise personnel from ministries and NGO's organizations
- Secretary - Director General, Energy Planning Department

\*\*\* Some key tasks as:-

- To lay down Energy Development Policy
- To concern for changing ratio between state-owned and private-owned sectors
- To estimate demand of energy and energy developing policy for short terms to long terms
- To improve strategies and opportunities for energy development
- To attract the foreign and domestic investments in renewable energy projects
- To regulate energy development project
- To seek technology and management assistances
- To acquire effective information in energy sectors

# Exploration and Development of Petroleum

## Summary

### Onshore

Daily Production mmcf	- Crude Oil <b>7600</b> bbl & Natural Gas <b>55</b>
Discovered	- 28 oil and gas fields
Producing Fields 23)	- 18 oil fields and 5 gas fields (Total
Tested/Suspended Fields	- 1 tested and 4 suspended oil fields
Appraisal	- 1 in Southern Chindwin Basin
<i>Unconventional Project</i>	- <i>Shale Gas Projects under Study Period</i>
IPR	- 1 field by Horizontal Drilling
Onshore Blocks	
Total Demarcated - 53 (Operating 16, awarded 16 blocks in 2013 Bidding, Open 21)	

**Domestic Crude Pipeline Network** - 535 km

**Domestic Gas Pipeline Network**

Onshore (4" to 20") - 2874.5 km

Offshore Yadana to Yangon (24") - 436 km (Offshore 286.5 km+ Onshore 149.7 km)

**Myanmar –China Pipeline**

# Exploration and Development of Petroleum

## Summary

### Offshore

- Producing Fields - Yadana, Yetagun and Shwe
- Daily Production - Crude Oil 10,000 bbl & Natural Gas 1400 mmcf
  - Yadana - 750 mmcf (722 BTU)
  - Yetagun - 10,000 bbl/day + 450 mmcf (1010 BTU)
  - Shwe - 200 mmcf (1012 BUT)
- Export - 1100 mmcf (Thailand) and 200 mmcf (China)
- Ongoing - Zawtika Project M-9 (year 2014)
- Plan - A Project for domestic use in Block M-3
- Appraisal - Block A-6
- Offshore Blocks - Demarcated Ttl 51: Operating 19, Bidding 30

### Export Gas Pipeline to Thailand (PTTEPI)

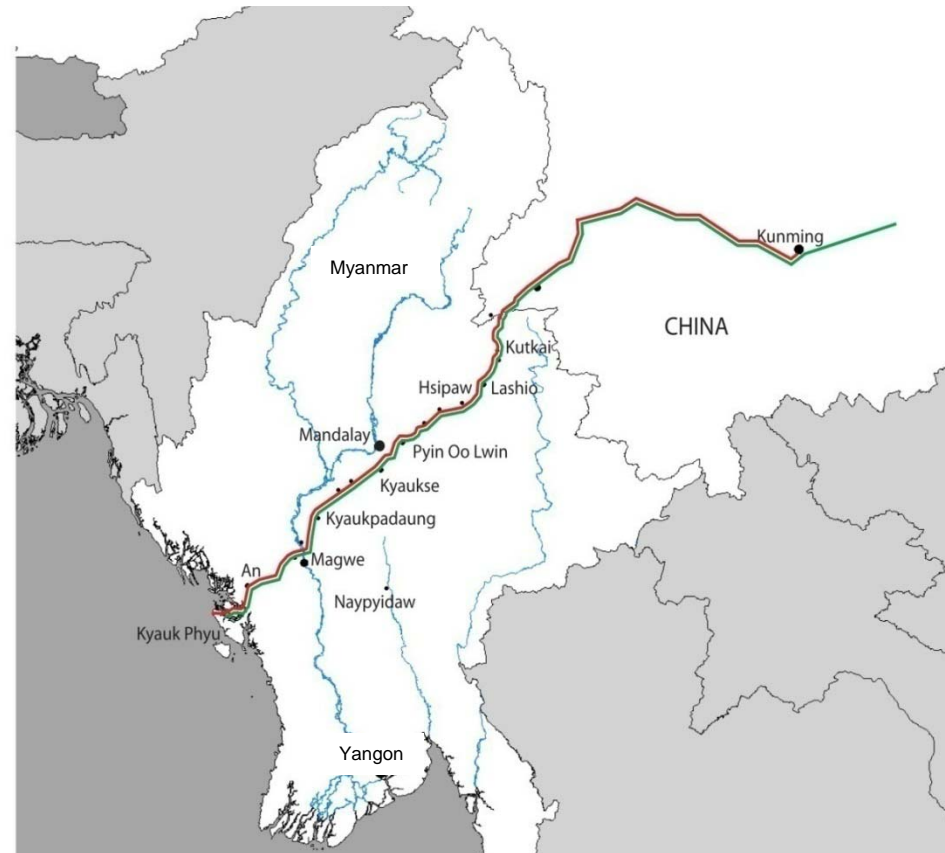
Yadana to Metering Station (36") - 410 km

Yetagun to Metering Station (24") - 274 km

Zawtika Project is undergoing in progress & 1<sup>st</sup>. Gas is estimated on February 2014!



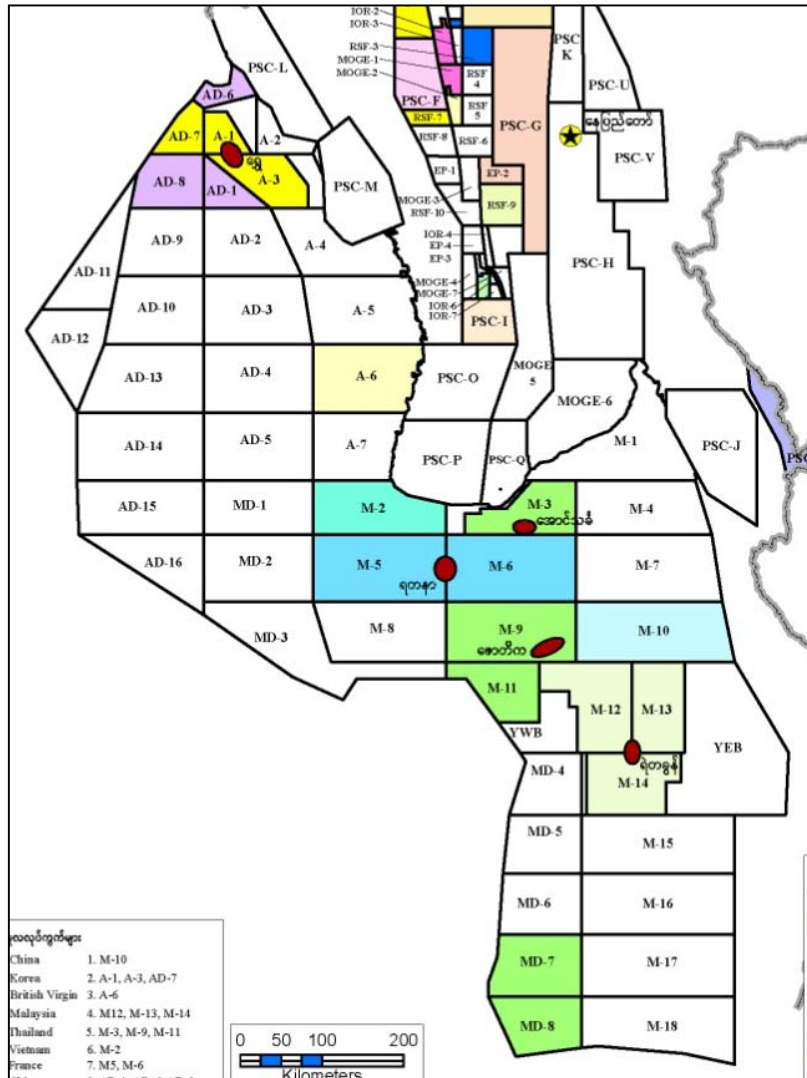
**MAP SHOWING OIL AND GAS FIELDS,  
GAS PIPE LINE, REFINERIES AND PETRO CHEMICAL PLANTS**



- Domestic Crude Pipeline - 119 km
- Domestic Gas Pipeline Network
- Onshore (4" to 20") - 2874 km
- Offshore, Yadana to Yangon (24") - 436 km
- Export Gas Pipeline to PTTEPI
- Yadana to Metering Station (36") - 395 km
- Yetagun to Metering Station (24") - 271 km
- Myanmar –China Crude and Gas Pipeline (Ongoing)
- Crude Pipeline (32"), Myanmar side - 760 km
- Gas Pipeline (40"), Myanmar side - 782 km



# Current Offshore Activities (19 blocks)



## Company / Operator

## Block

**TOTAL**

- M-5, M-6

(Yatana Project)

**PETRONAS**

- M-12, M-13, M-14

(Yetagun Project)

**DAEWOO INTERNATIONAL**

- A-1, A-3, AD-7

(Shwe Project)

**PTTEPI**

- M-3, M-11,

- M-9 (Zawtika Project)

- MD-7, MD-8

**CNOOC**

- M-10

**CNPC INTERNATIONAL LTD**

- AD-1, AD-6, AD-8

**MPRL E&P**

- A-6

**PETROVIETNAM**

- M-2

In offshore area, **18** Contracts are active in **19** offshore blocks with **8** foreign companies from **8** countries.

## Existing Petrochemical Plants Operated under Myanmar Petrochemical Enterprise (MPE)

Crude Oil Refinery	- 3 (51,000 bbl/day)
LPG Plant	- 3 (50 mmscfd)
Fertilizer Plant (Urea)	- 5 (Ammonia 1340 MTD & Urea 2012MTD)
Methanol Plant	- 1 (450 MT/day, under rehabilitation)
CO <sub>2</sub> Recovery Plant	- 1 (Liquid 24 Ton & Dry ice 6 Ton/day)
Others	- Waxing and Bitumen (548 MT/day)

# Privatization Scheme

- Distribution of Petroleum Products including LPG
- Refineries under JV system, Initiating & Exercising to  
Thanlyin refinery near Yangon at present
- Promoting and Improving to Private Sectors by !

# **Improvement of Petroleum Sector for New Comers**

- **EITI process by collaborating between State Own Enterprises and IOCs**
- **EIA, SIA and EMP for all movements**
- **Foreign Investment Law 2012**
- **More Institutions and Cooperation**
- **Regional cooperation in ASEAN and wider**

## **Role and Future Petroleum Sector**

- **Key factors for National Economic growth**
- **To priority the demand of domestic needs**
- **Domestic market oriented, especially natural gas based industries**
- **Comprehensive roadmap for sustainable development subsequent to National Energy Policy by NEMC**
- **Promoting private sectors both in upstream and downstream sectors**

# Potential Opportunities

- ✓ E&P in onshore and offshore area
- ✓ EOR and Unconventional Hydrocarbon
- ✓ New Refinery
- ✓ LPG and LNG project
- ✓ Existing Refineries: JV system
- ✓ Trading of Petroleum Products
- ✓ Research and Development, e.g. Laboratory, Process etc.
- ✓ Supply equipments spare for Factories and Plants



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