



Myanmar Transport Infrastructure and Logistics Development

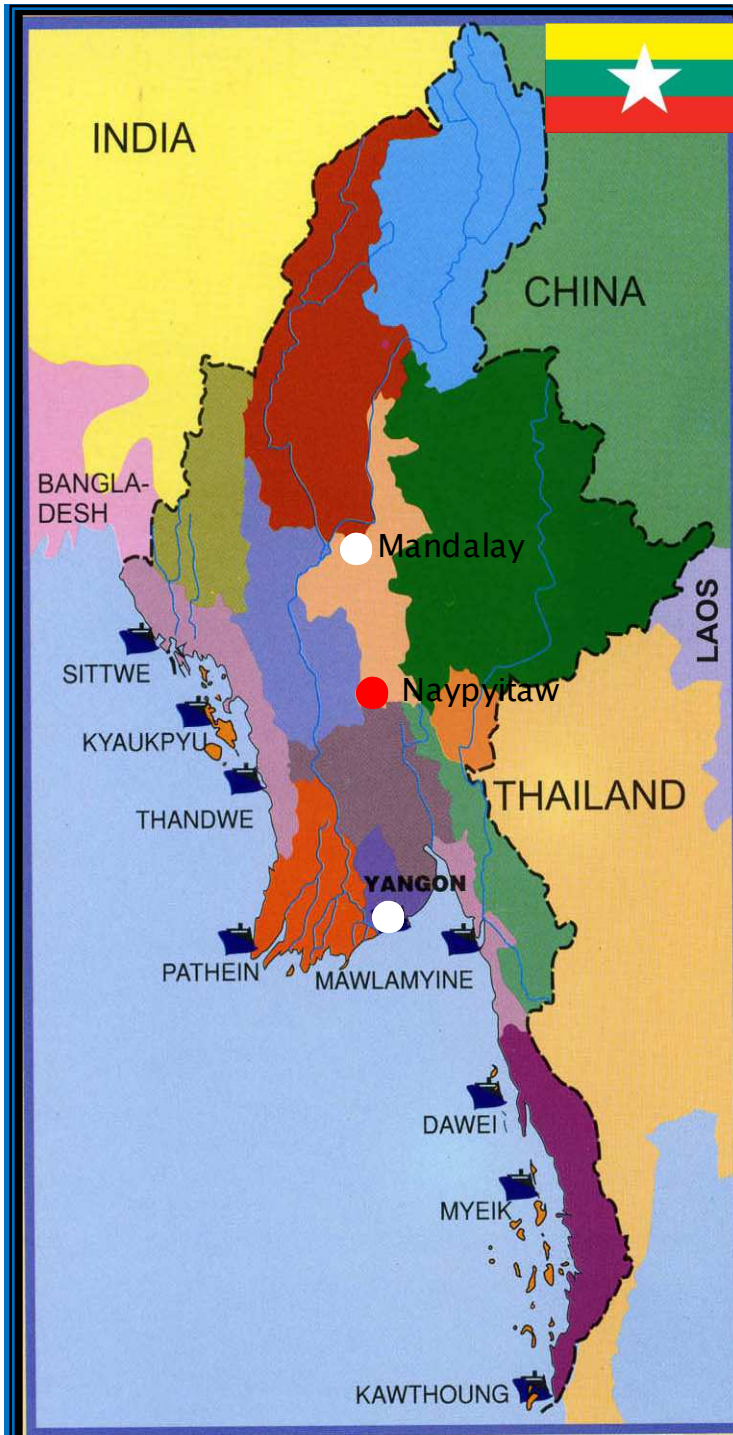
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General Information about Myanmar



- Formal name **Republic of the Union of Myanmar**
- Myanmar lies between
 Lat. 9° 32' and 28° 31' N and
 Long. 92° 10' and 101° 11' E
- Total land area **676,578 sq km**
- Total length
 (South to North) **2,100 km**
 (East to West) **925 km**
- Navigable length **6650 km**
- Total land boundaries **5,867 km**
- Total length of coastline **2,832 km**
- Cities **Naypyitaw, Yangon, Mandalay**
- Population **59.13 M (2010)**
- Official language **Myanmar**
- Economy **Agro-based**
- Main rivers** **Ayeyarwaddy, Chindwin**
Sittaung, Thanlwin
- Neighbours** **China, Lao PDR, Thailand,**
Bangladesh, India

Transport Administration

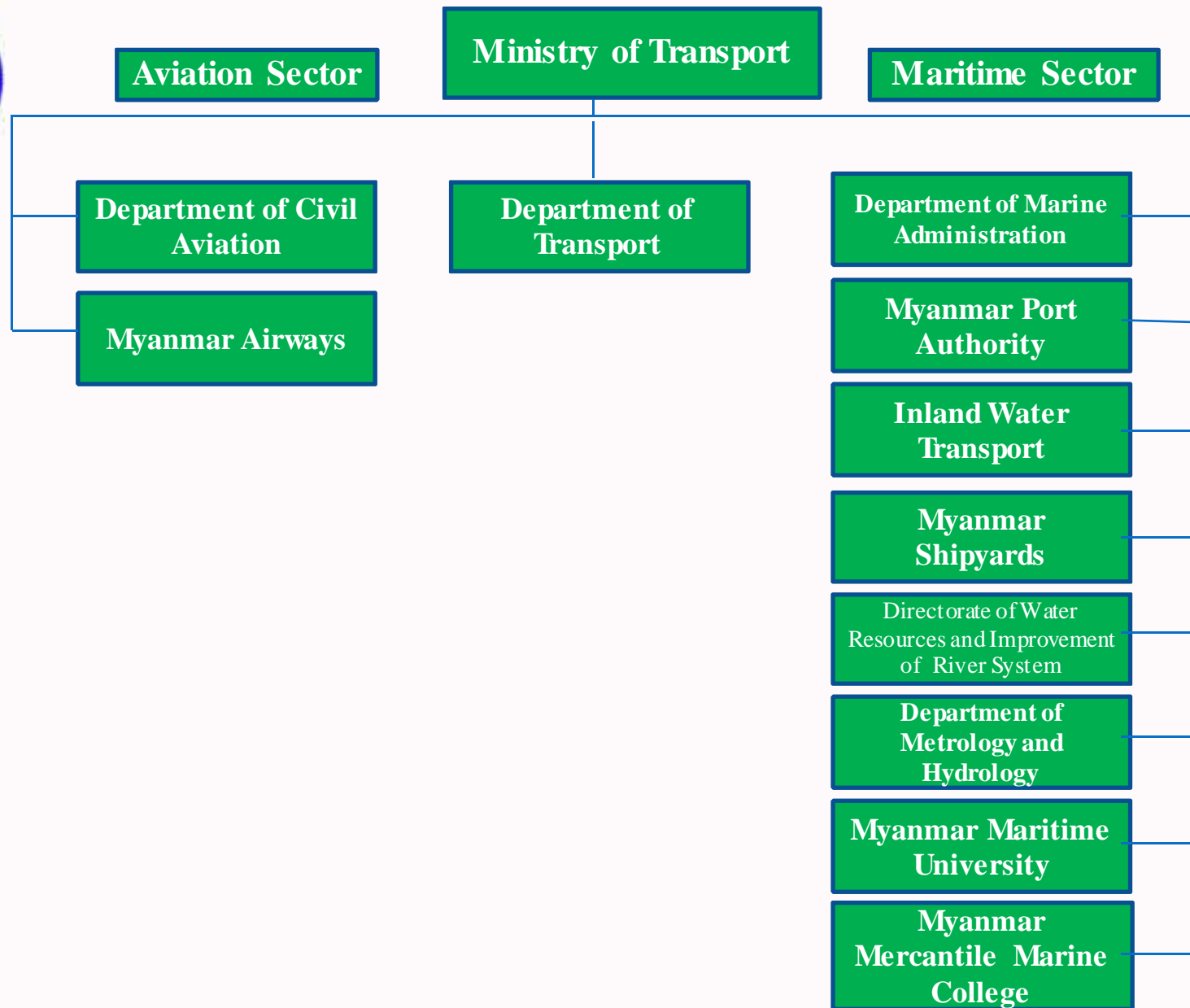
- **Ministry of Construction**
construction and maintenance of national roads and bridges;
- **Ministry of Rail Transport**
land and rail transport;
- **Ministry of Transport**
marine and air transport;
- **Urban Transport**
 - Naypyitaw Development Committee
 - Yangon City Development Committee
 - Mandalay City Development Committee

The Ministry of Border Affairs

for construction and maintenance of roads and bridges in border areas



ORGANIZATION CHART OF MINISTRY OF TRANSPORT



Airports

Myanmar is presently using 33 airports out of its 69 airports. Of these, 3 are opened as international airports while the others are used as domestic airports.

International Airports

- ❖ **Yangon International Airport**
(passenger handling capability- 2.7 million)
- ❖ **Mandalay International Airport**
(passenger handling capability- 3 million)
- ❖ **Naypyitaw International Airport**
(passenger handling capability- 3.5 million)



Domestic Airports

- ❖ **30 Domestic Airports** (some airports are serving int'l charter operations)



National Airlines

Today Myanmar has

- 7 domestic airlines.... Myanmar Airways, Yangon Airways, Air Mandalay, Air Bagan, Asian Wings Airways, Air KBZ and Golden Myanmar, which are operating twenty-seven domestic destinations with F 28, F 100, ATR 72, ATR 42, MA 60 and Embraer 190 aircrafts.
- 1 international airline ... Myanmar Airways International, which is operating international scheduled services per week between Myanmar and seven regional destinations with A 320 aircrafts.





International routes which are being operated by foreign airlines

Thai Airways International, Bangkok Airways, Thai Airasia

Bangkok-Yangon

Malaysia Airlines & Airasia Berhad

Kuala Lumpur-Yangon

Silk Air, JetStar Airways & Singapore

Singapore-Yangon

Air China & China Eastern Airlines

Kunming-Yangon

China Eastern Airlines

Kunming-Mandalay

Nanning-Yangon

China Southern Airlines

Guangzhou-Yangon

China Airlines

Taipei-Yangon

(Regular Charter)

Vietnam Airlines

Ha Noi-Yangon

Ho Chi Minh-Yangon

Air India

Kolkata-Yangon

Korean Airline

Inchon-Yangon

Eva Air

Taipei-Yangon

Qatar Airways

Dohar-Yangon

Passenger Traffic in Yangon International Airport

Sr.	Year	International Pax	Domestic Pax	Growth Rate
1	2003	548202	603774	
2	2004	670008	665630	10%
3	2005	725858	699209	5%
4	2006	825236	748600	7%
5	2007	867853	755200	1%
6	2008	824595	654979	(-)13%
7	2009	967622	659607	1%
8	2010	1211372	778433	18%
9	2011	1448729	998616	28%
10	2012	1925762	1139654	14%

Source – DCA (2012)

Passenger Traffic (cont'd)

(Yangon International Airport)

- The Total inbound and outbound international passengers in 2012 increased 32.9 % on that of 2011
- The Total inbound and outbound domestic passengers in 2012 increased 14.12 % on that of 2011
- Passenger traffic at the airport has been growing year on year with the annual growth rate of 20.12%
- It is forecasted that passenger traffic will be 5.4 million in 2015



Maritime Transport

Yangon Port

Yangon Port is the river port and premier port of Myanmar which handles about 90% of seaborne trade of the country.



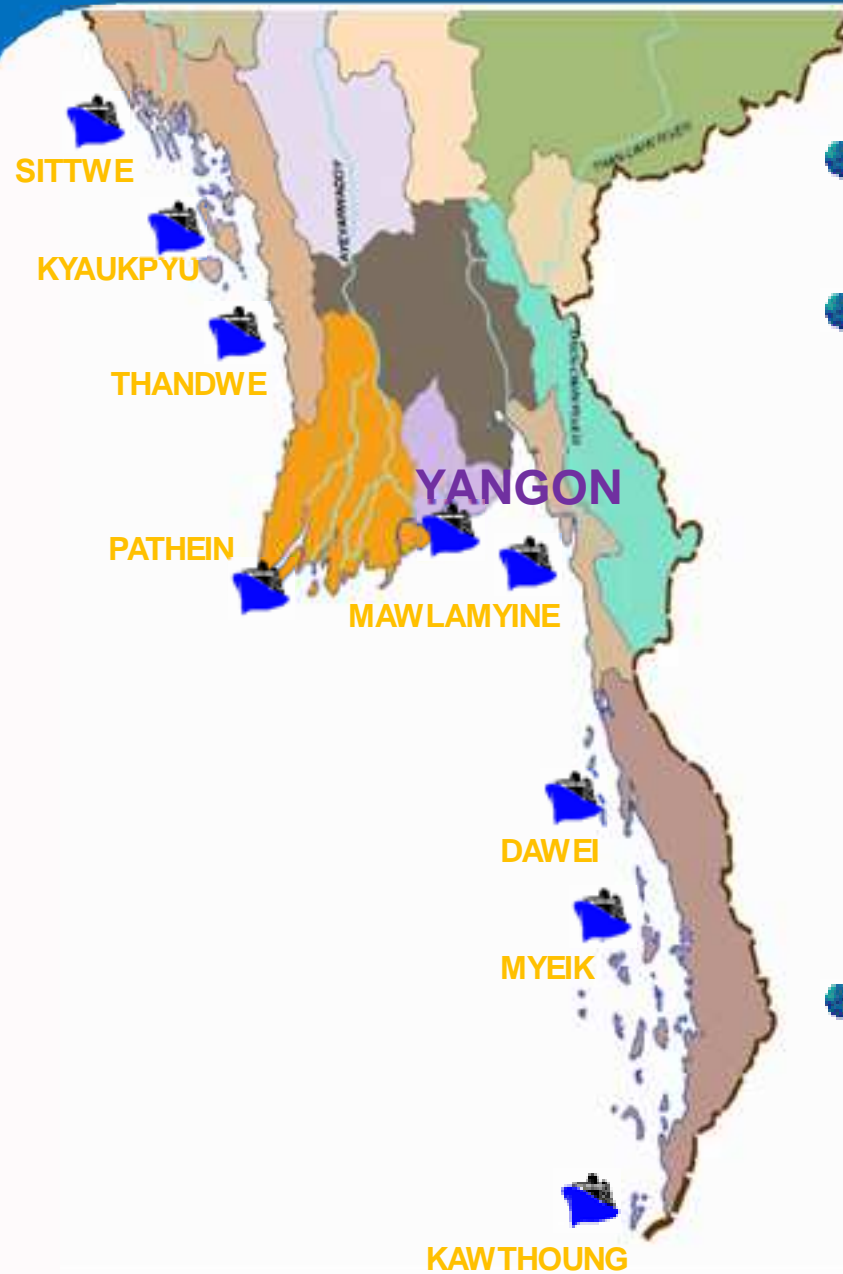
International Wharves

International wharves

- Yangon Port - 18 wharves
 - Thilawa Port - 6 wharves
- Total** - 24 wharves
- ICD** - 3 Depots

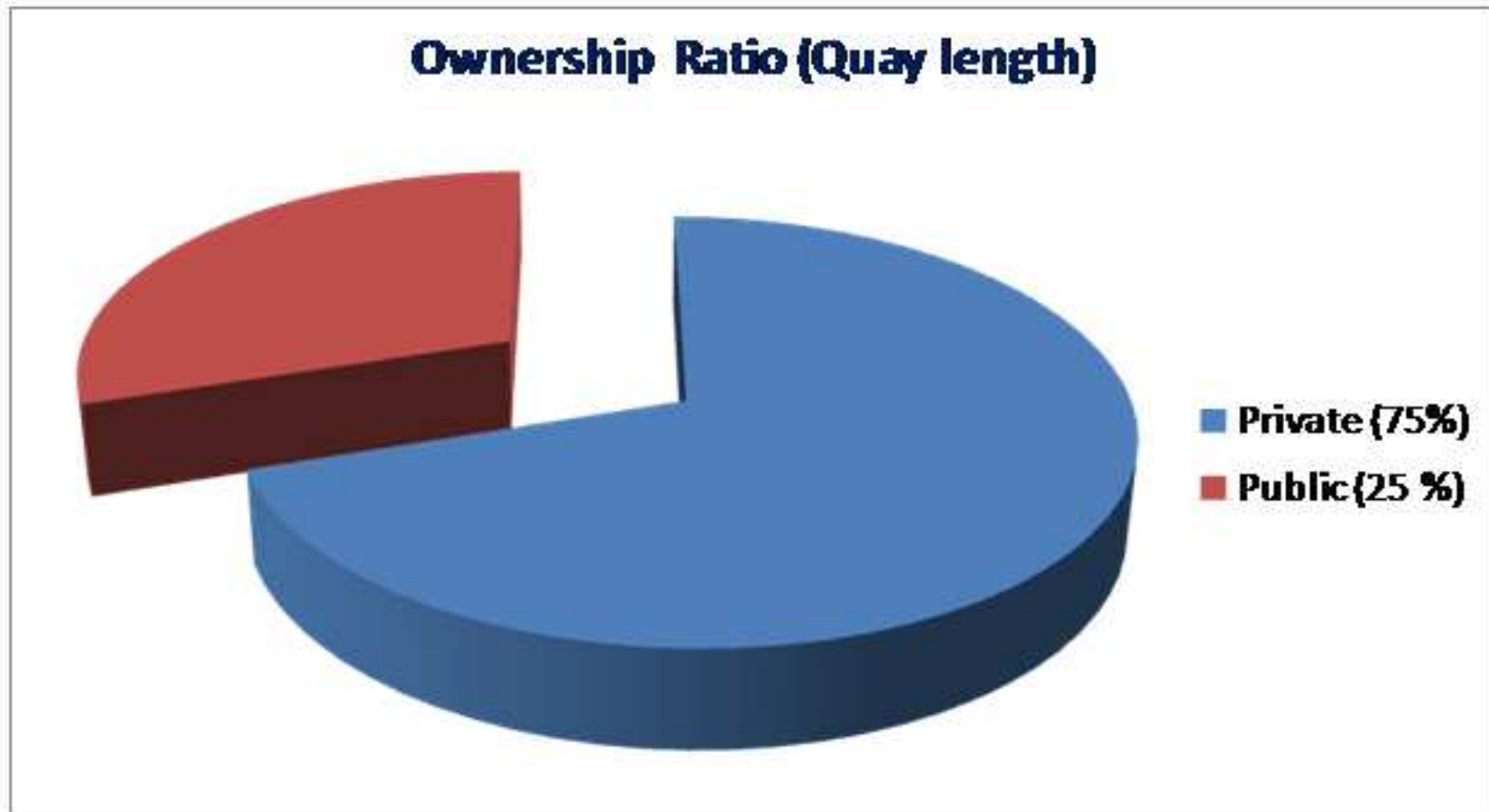


Ports Activities



- There are also 8 other coastal ports known as Out ports along the coast.
- To cope with the growth of the maritime trade volume after adoption of the market oriented economy of the country and the regional demand of larger vessels for seaborne traffic, the government laid down the plan to develop Deep Sea Commercial Ports at suitable sites along the coast of Myanmar.
- MPA selected two places –
 - Dawei Deep Sea Port Project (Italian – Thai Dev: Co.,ltd)
 - Kyaukpyu Deep Sea Port and railway project (CITIC Group, China)

Public and Private Ownership Ratio of Port Facilities



General Cargo Handled in Port of Yangon

(M.ton in thousand)

No	Year	Import	Export	Total
1	2002-2003	6005	4835	10,840
2	2003-2004	5191	4609	9,800
3	2004-2005	5208	4773	9,981
4	2005-2006	5514	4725	10,239
5	2006-2007	5623	5332	10,955
6	2007-2008	6240	5619	11,859
7	2008-2009	6150	6166	12,316
8	2009-2010	9492	6655	16,147
9	2010-2011	12307	6131	18,438
10	2011-2012	14461	7261	21,722
11	2012-2013 (Up to November)	8627	5099	13,726
12	2016-2017 (Estimate)			39788
13	2030-2031 (Estimate)			123041

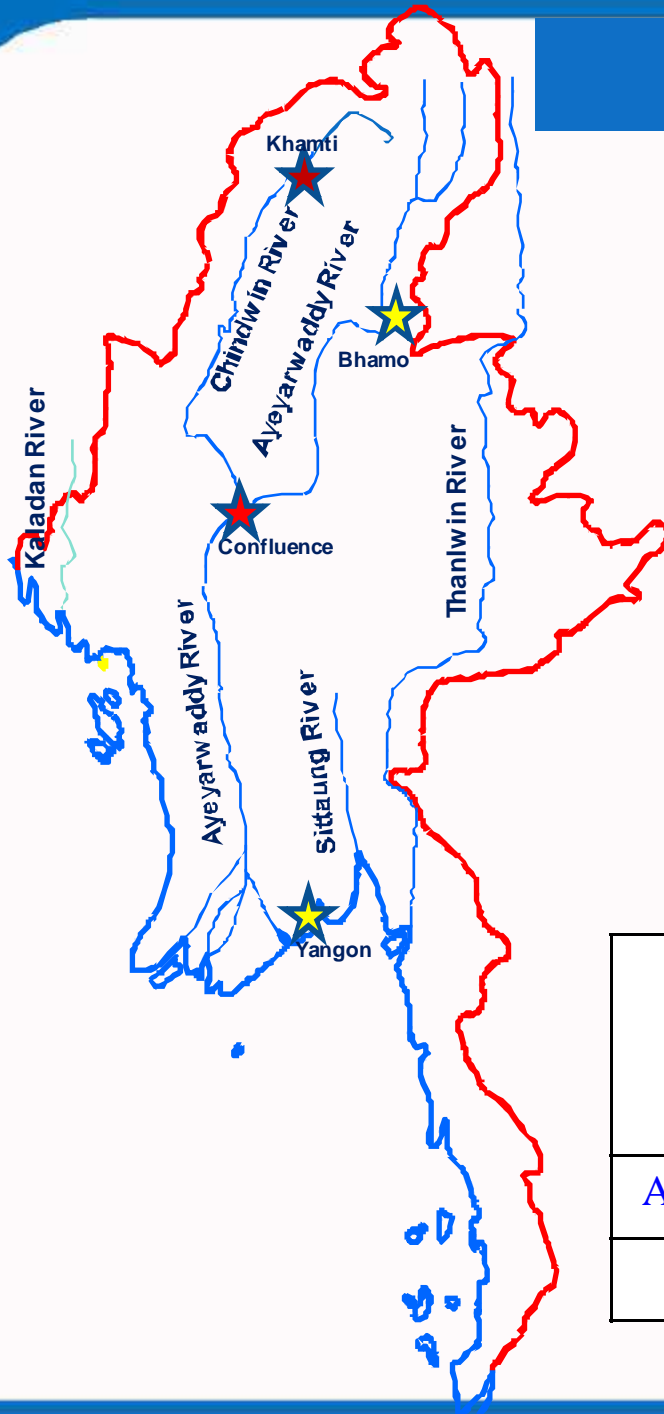
Growth Rate 83.17% for (5) years, 100.38% for coming (10) years,

Volume of Container Handled in Port of Yangon

(M.ton in thousand)

No	Year	Import	Export	Total (TEU)	Total (M.T in thousand)
1	2002-2003	97.573	98.140	195.713	2838.689
2	2003-2004	86.867	86.457	173.324	2676.184
3	2004-2005	78.223	77.361	155.584	2664.521
4	2005-2006	86.130	85.775	171.905	2606.160
5	2006-2007	99.942	97.337	197.279	3148.045
6	2007-2008	115.267	111.236	226.503	3462.489
7	2008-2009	133.712	130.294	264.006	3937.131
8	2009-2010	152.077	151.333	303.410	4372.025
9	2010-2011	175.315	171.327	346.642	4571.902
10	2011-2012	207.540	200.503	408.043	5594.589
11	2012-2013 (Up to November)	149.430	154.721	304.151	3944.733
12	2016-2017 (Estimate)	Estimate	will be		9039.74
13	2030-2031 (Estimate)	Estimate	will be		21712.04

Inland Water Transport



- **Ayeyarwaddy River - 1534 km**
 - **Chindwin River - 730 km**
 - **Thanlwin and rivers in Mon State - 380 km**
 - **Rivers in Ayeyarwaddy Delta - 2404 km**
 - **Rivers in Rakhine State - 1602 km**
- Total - 6650 km**

Name of river	Catchment (sq-km)	Navigable Route (km)	Discharge (million cu-m)	Sediment Transport (million ton)
Ayeyarwaddy	288900	1332	313720	278
Chindwin	115300	730	141290	131

Inland Water Transport

- IWT is operating passenger cum cargo transportation & the ferry services
- 218 inland waterways ports
- Maximum drafts are about 4.5 ft to 5.5 ft.
- No terminals capable of handling containers



The Capacities of Inland Vessels in Myanmar

Number of vessel **-412**

▪ **Vessels** **-225**

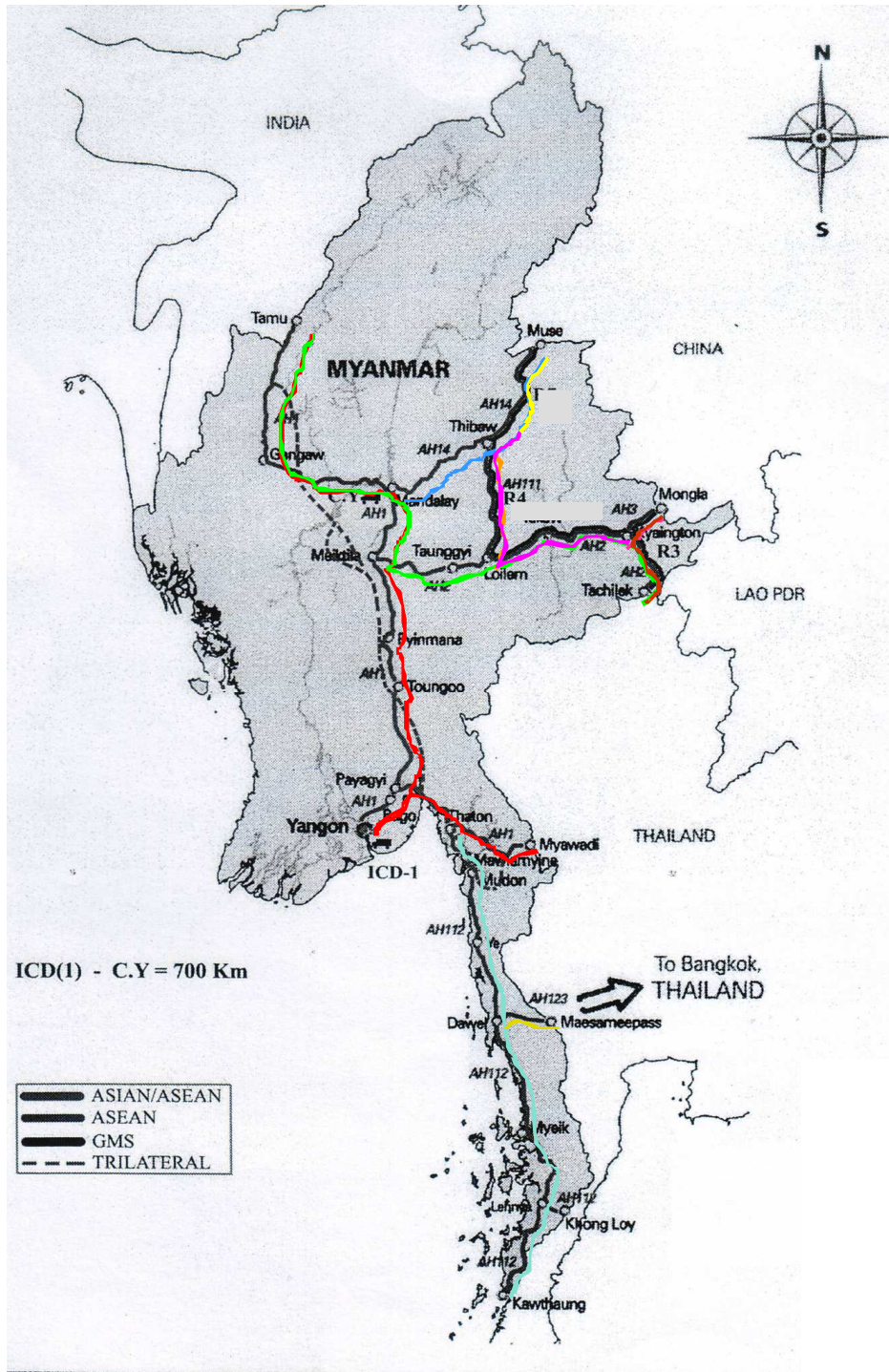
▪ **Barges** **-148**

▪ **Pontoon** **-39**



Road Transport

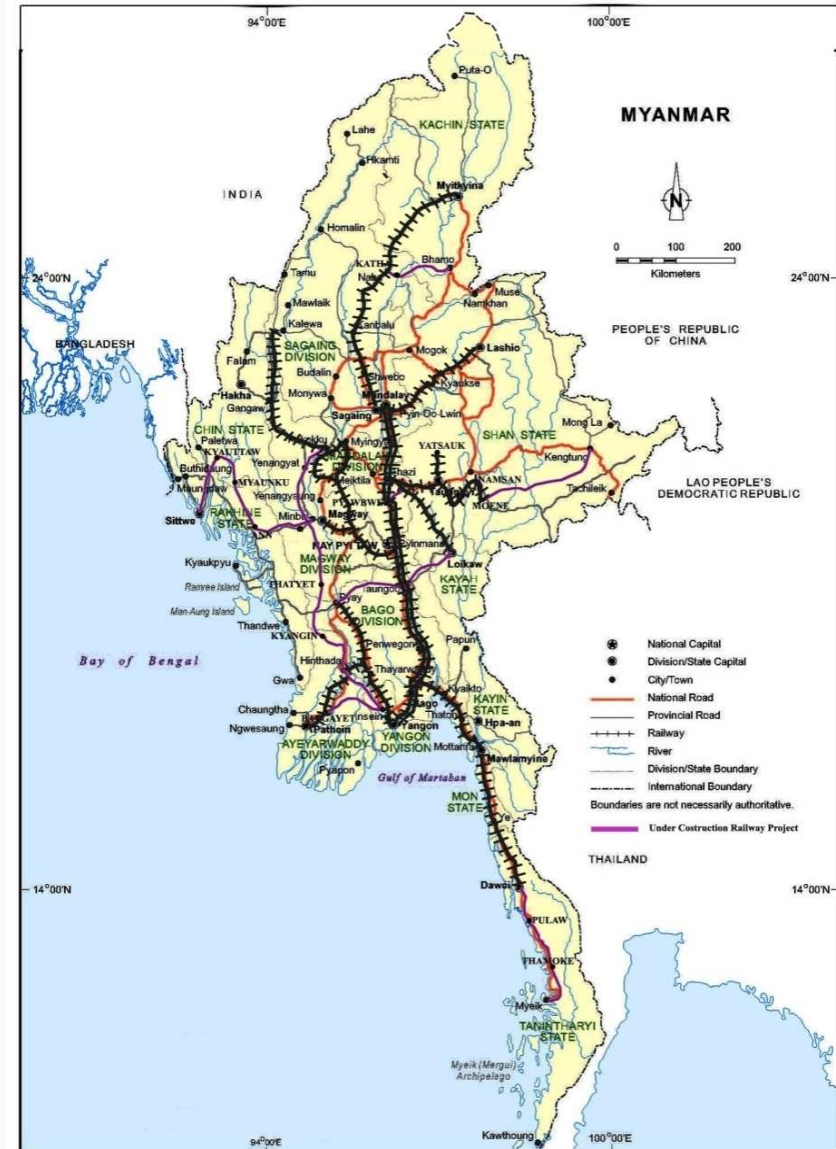
- **Total Road Length:**
148690 km
- **Paved Road:**
33014 km
- **Express Way:**
666.36km
- **Number of registered vehicles:**
2476672 (June, 2012)



Railway Transportation in Myanmar



- A state owned and sole operator of the rail system in Myanmar.
- **Total Route Length – 5844.03 Km**
 - Single Truck - 5143.21 Km
 - Double Truck - 700.82 Km
 - Bridges - 11659 Nos
 - Tunnels - 12 Nos
 - Stations - 926 Nos
- **64.352 passengers and 3.58 freight tons in million**



Logistics

Myanmar Logistics Development

● **National Level Workshop on Economic Development through the Integration of Logistics Services was held in Nay Pyi Taw on 17-18 of March 2008.**

● **Participants :**

■ **Officials**

■ **Entrepreneurs from Private Sectors**

■ **Economic Experts**

Myanmar Logistics Development

THE CONSULTATIVE COMMITTEES

To formulate the Policy, Time Frame and Action Plan in accordance with related sectors, 5 consultative committees have been formed with concerned Ministries:

- ✓ Infrastructure development**
- ✓ Transport services development**
- ✓ Laws, rules and regulation**
- ✓ Human resources development**
- ✓ IT development**

After that the national logistics policy and roadmap will be adopted based on committees' measures.

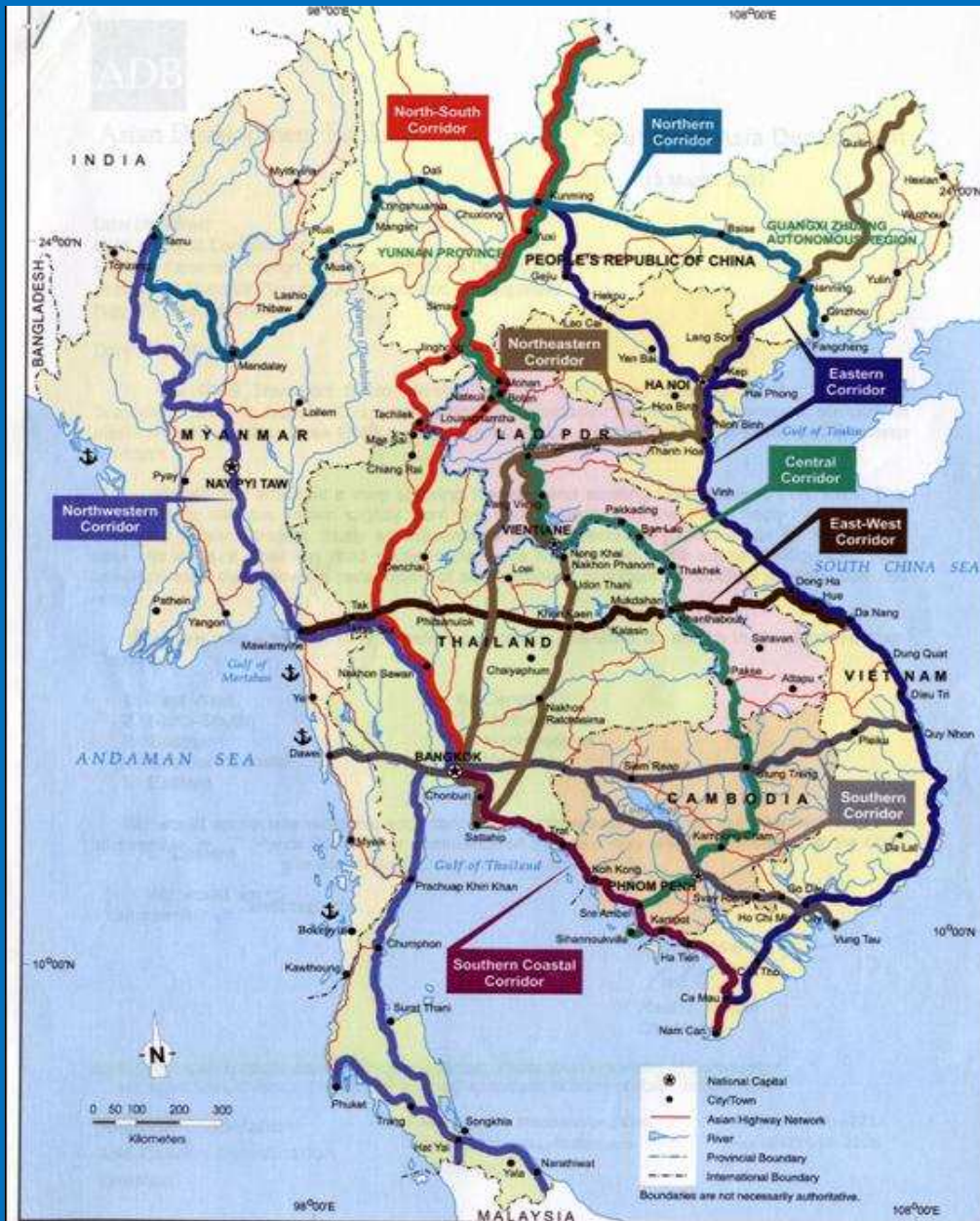
Liberalization Status of Logistics Services

No	Measure	Time Line	Remark
1	Maritime cargo handling services(CPC 741)	2013	Completed
2	Storage & warehousing services(CPC 742)	2013	Completed
3	Freight transport agency services(CPC 748) {Freight brokerage services, freight forwarding services, ship and aircraft space brokerage services and freight consolidation and break-bulk services}	2013	Not Complete
4	Other auxiliary services(CPC 749) {Freight brokerage services; bill auditing and freight rate information services; transportation document preparation services; packing and crating and unpacking and de-crating services; freight inspection; weighing and sampling services; and freight receiving and acceptance services}	2013	Not Complete
5	Courier services(CPC 7512**)	2013	Completed
6	Packaging services(CPC 876)	2013	Completed
7	Customs clearance services	2013	Not Complete

Liberalization Status of Logistics Services

No	Measure	Time Line	Remark
8	International Freight Transportation(CPC 7212) excluding cabotage	2013	Completed
9	International rail freight transport services(CPC 7112)	Beginning 2008	Not Complete
10	International road freight transport services(CPC 7213)	Beginning 2008	Not Complete

Economic Corridors in GMS



GMS CORRIDORS & Proposed Deep Sea Port

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Economic Corridors in Myanmar

- ✿ East West Corridor
Mawlamyine - Myawady - Da Nang
- ✿ Southern Corridor
Dawei - Quy Nhon/Vung Tau
- ✿ North-South Corridor
Kunming - Mongla - Kyaington
- Tachileik – Bangkok
- ✿ Northern Corridor
Fangcheng - Muse - Mandalay
– Tamu
- ✿ Western Corridor
Tamu - Bagan - Mawlamyine

ASIAN and ASEAN HIGHWAY ROUTES IN MYANMAR



ASEAN HIGHWAY NETWORK

- AH1 - Myawaddy-Payagyi(Yangon)-
Meikhtila-Mandalay-Tamu
(1665km)
- AH2 - Tachilek-Kyaing Tong-Meikhtila-
Mandalay-Tamu (807 km)
- AH3 - Monglar-Kyaing Tong (93 km)
- AH14 - Muse-Lashio-Mandalay (453 km)
- AH111 - Thibaw-Loilen (239 km)
- AH112 - Thatton-Mawlamyine-Dawei-
Mugui-Lenya-Kawthaung(1145km)
- AH123 - Dawei-Sinphyutaung-Bongti
(141km)

Total - 4543 km (Inside Myanmar)

Logistics Development

- ✦ Cooperations and Coordinations are being taken to implement the measures under the roadmap for the integration of Logistics Services of ASEAN.
- ✦ Trainings related to the Multimodal Transport & Logistics for both public and private are being conducted with the cooperation of Department of Transport, Myanmar Maritime University and UNESCAP.
- ✦ Infrastructure Development Projects on Air, Maritime, Road and Rail Transport are being taken to be in line with international standards.
- ✦ Actions are being taken to utilize applicable IT by MPA.
- ✦ Actions are being taken to form National Logistics Association in near future.

Future Development Plans

Priorities on Air Transport Sector

To achieve the (12) objectives of air transport sector, the following projects will be implemented within 2011- 2012 to 2015-2016 fiscal year ;

- **Construction of new Hanthawaddy International Airport**
- **Allowing private sector to participate in the operations of airports**
- **Adoption of a National Air Transport Policy**
- **Drawing up and implementing a Master Plan for Civil Aviation Development**
- **Updating respective Acts and Rules**
- **Reforming the institutional set-up of the DCA**
- **Setting up an Airports Authority**

Priorities on Air Transport Sector

- **Relations with international organizations**
- **Promoting technology and enhancing Human Resource Development**
- **Improving Yangon International Airport, Coco island Airport, Putao Airport, Sittwe Airport, Kyaukpyu Airport, Thandwe Airport, Kalay Airport, Nyaung U Airport, Heho Airport, Myitkyina Airport and upgrading Naungmom Airport, Phalan Airport, Manaung (Samonte) Airport, Mong-hsat Airport**
- **Enhancing air navigation services which will remain under the jurisdiction of the DCA**

Priorities on Maritime Transport Sector

- **Purchasing new 37 vessels with Japanese loan or grant aid**
USD 31.77 million for the replacement of old ones
- **Upgrading Dala dockyard with Japanese Grant aid**
- **Getting three ferries for the Pansoedan-Dala ferry line**
- **Extending new international terminal along the Yangon river for the development of Yangon port area**
- **Establishing new five terminals for international shipping in Thilawa port area with loan or grant**
- **Conducting the training of Ayeyarwaddy and Chindwin rivers**
- **Constructing six modernized new domestic ports in Ayeyarwaddy and Chindwin rivers with grant or loan**

Priorities on Road Transport Sector

- **Shwebo- Myitkyina road**
- **Mawlamyine- Ye- Dawei- Meik- Kawthaung road**
- **Meikhtila- Taunggyi- Kyaingtong- Tacheleik road**
- **Monywa- Pale- Gangaw- Kalaymyo road**
- **Yargyi- Kalaywa road**
- **Mandalay- Thabeikkyin- Tagaung- Bhamaw- Myitkyina road**
- **Minbu- Ann- Sittwe road**
- **India- Myanmar- Thai Tripartite road**

Priority Projects for Transport Development

- National Transport Network System needs to implement in line with the current political and economic systems of the State.
- National Integrated Transport Master Plan will be formulated for long term and sustainable transport development.
- In the present Stage, Consultants of JICA and Officials concerned of Myanmar are taking initial process to conduct the feasibility study to adopt the strategies for the Transport Development and also to formulate the National Integrated Transport Master Plan by 2014.
- At the same time, infrastructure improvement actions are required urgently to conduct in order to support the process of poverty reduction, development of socio economy of the people and settlement of constraints in the transport sector.

Projects to be implemented with the Assistances

For the development of Inland Water Transportation and Multi-dimensional development of Ayeyarwaddy river, the following projects will be implemented with the assistances ;

- Navigation Channel improvement in Ayeyarwaddy and Chindwin Rivers**
- Weirs Plan on Ayeyarwaddy River**
- Improvement of (6) Inland Ports along Ayeyarwaddy and Chindwin Rivers**
- Installation of Navigation Equipments along the waterways**
- Purchasing New Vessels and Barges for Inland Water Transport**
- Construction of a New Multi Purpose Terminal at Thilawa with loan**

- ❁ Large amount of sediment load concentration of the Ayeyarwaddy and Chindwin Rivers are important factors that affect to river's morphology and environmental changes





Proposed Pilot Project in Yatabo Waterway, Mandalay Region

Sr.no	Name	Amount
-------	------	--------

- | | | |
|----|---------------------------------------|------------------|
| 1. | Feasibility Study + Design | Euro 2.0 million |
| 2. | Ayeyarwaddy river channel improvement | Euro 400 million |

Pilot
Project
Study:
Yandabo
facility



Sr. No.	Township	Location	Dist. from estuary (km)	Width of River (meter)	Above MSL (meter)	Discharge (m ³ /sec)	Height of weir (Head) (meter)	Back water length (km)	Water surface area bet. Two weirs (sq. km)	No. of Turbine	Out put Power (MW)
1	Myingyan	Yantabo	806	760	59.5	6290	8.5	94	240	6	180



Appropriate Sites of New Inland Ports

Ayeyarwaddy River

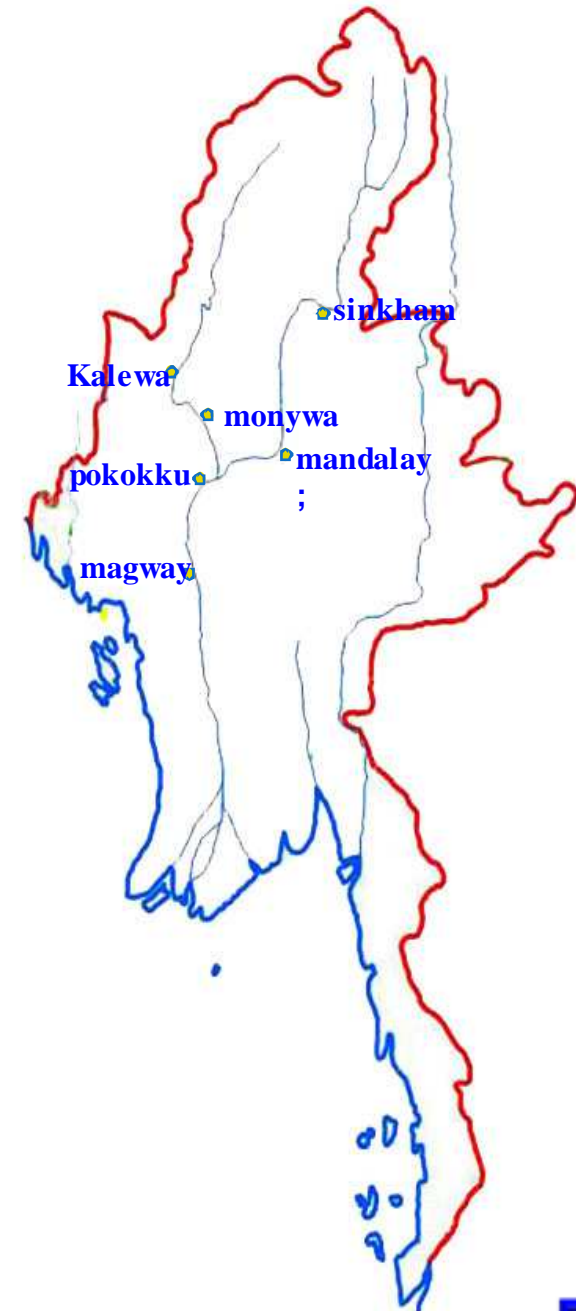
- Sinkham Port
- Mandalay Port
- Pokokku Port
- Magway Port

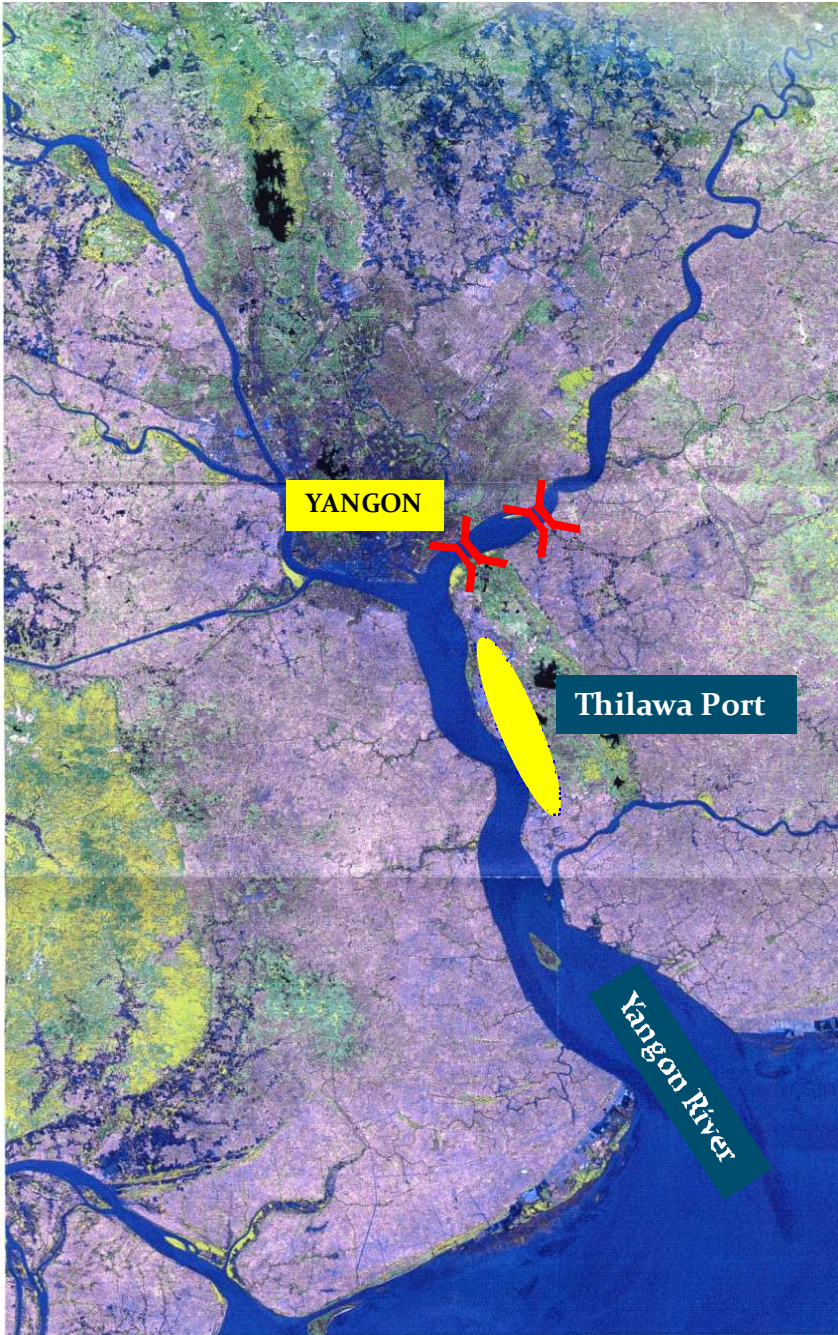
❖ Chindwin river

- Monywa Port
- Kalewa Port

The estimate cost US\$ 60 million

- **Benefits - Facilitation and efficient transportation**
 - Developing new inland ports
 - Developing SEZ and industrial zones
 - Getting more revenue
 - Creating employment opportunities
 - Developing foreign investment
- **Costs - US\$ 60 millions.**





Thilawa Port Development Projects

- To cope with the growth of the maritime trade volume after adoption of the market oriented economy of the country.
- A New Multi Purpose (5) Terminals at Thilawa will be established.

Projects to be implemented with the Assistances

Road Transport

- ❖ New Bridge Construction at 17 Places ; Hinthata, Dala, Hlaing, Bayintnaung No. 2, New Goat Twin, Wataya, New Thaketa, Gyaing, Thamouk, Donthami, Kalaywa, Thetkalthoung, Chaungnitkwa, Thanlwin, Yawchaung.
- ❖ Rehabilitation at 21 Bridges; Maubin, Balamintin, Twantay, Pathein, Myaungmya, Gyaing, Attrayan, Maei, Kyaukkyi Pauk, Snarepauk, Lonetawpauk, Dedokepauk, Thanthamagyi, Thanthamachay, Thazintanpauk, Wanphite, Minkyaung, Yanmaung, Kisspanaddy, Minchaung.
- ❖ Upgrading of Research Labs at Yangon, Naypyitaw, Mandalay.

Projects to be implemented with the Assistances

● Rail Transport

- ❖ National Railways Strategic Plan
- ❖ Rehabilitation and Modernization of Yangon-Mandalay Railway System
- ❖ Mandalay – Myitkyina track signal upgrading
- ❖ Bago – Dawei track upgrading
- ❖ Yangon – Pyay track upgrading
- ❖ Tamu - Kalay - Segyi - Monywa - Mandalay Project
- ❖ Improvement of Urban Railway System in Yangon City
- ❖ Refurbishment of Diesel Locomotives
- ❖ Upgrading of Railway Technical Training Center



Thank You

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