



Ministry of Electricity and Energy

Oil and Gas Planning Department

Current Status of Oil and Gas Sector

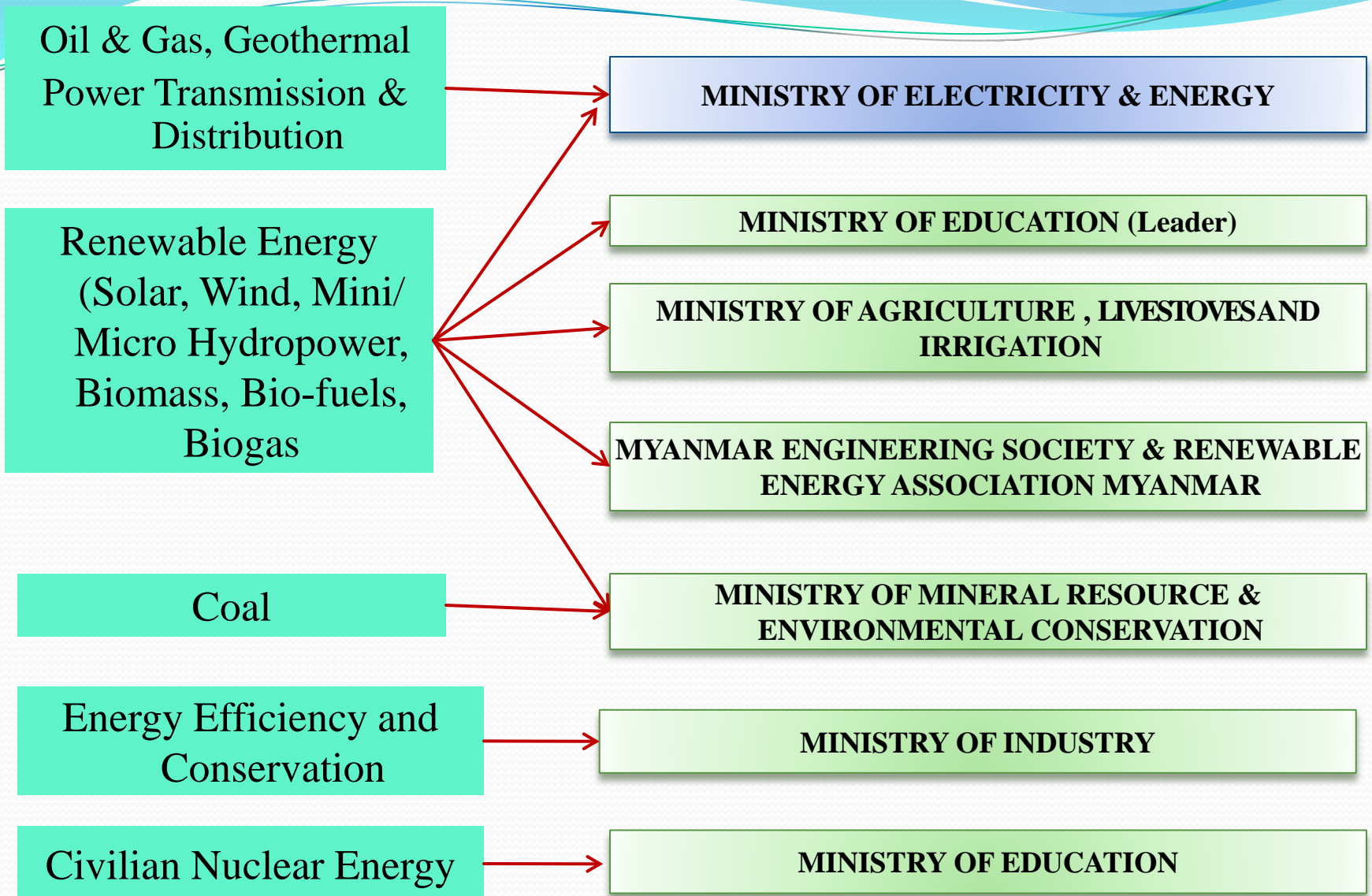
25th August, 2016

Nay Pyi Taw

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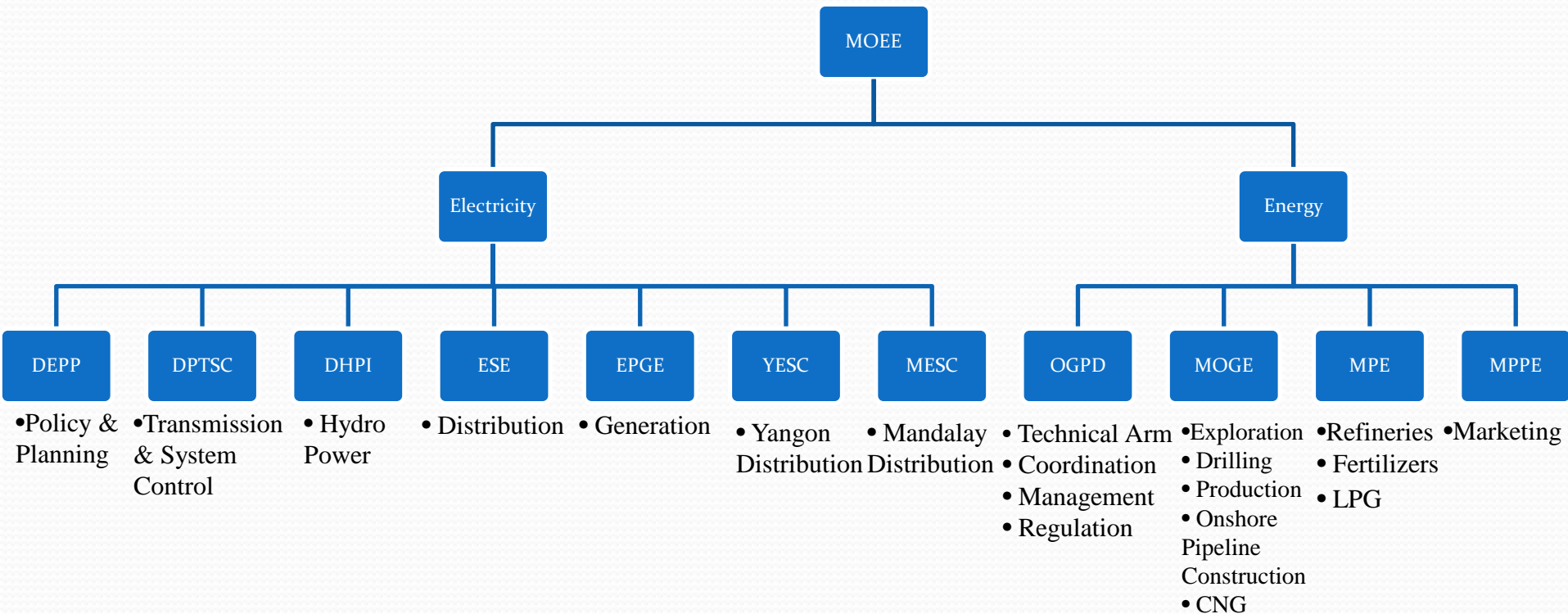
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I. Institutional Framework of Myanmar Energy Sector



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

II. Organizational Structure of Ministry of Electricity and Energy



III. Oil and Gas Sector Policy

1. To fulfill the domestic energy requirement on a prioritized basis and to implement the effective utilization of discovered crude oil and natural gas in the interest of the entire nation including the region where the discovery was made
2. To implement sustainable energy development
3. To promote energy efficiency and conservation
4. To promote alternative energy utilization for household energy
5. To promote private sector participation in energy sector
6. To minimize environmental and social impacts in implementing the energy projects
7. To promote utilization of new and renewable energy resources
8. To cooperate with other relevant organizations for the compilation of reliable and accurate statistics pertaining to energy production, supply, demand and energy projection.



IV. Current Status of Upstream Sector

Demarcation of Blocks

Onshore	-	53 Blocks
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Offshore	-	51 Blocks
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Production , Export & Domestic Supply

→ Daily Gas Production:

Onshore	-	60 mmcf
Offshore	-	2.04 bcf

→ Daily Oil Production:

Onshore	-	8,000 bbl
Offshore	-	8,000 bbl (Condensate from Yetagon Gas Field)

→ **Export Gas to Thailand** - 1.2~ 1.3 bcfd

→ **Export Gas to China** - 400 mmcfd

→ **Domestic Gas Utilization** - 260 mmcfd

→ **Import Diesel** - 53,000 bbl per day

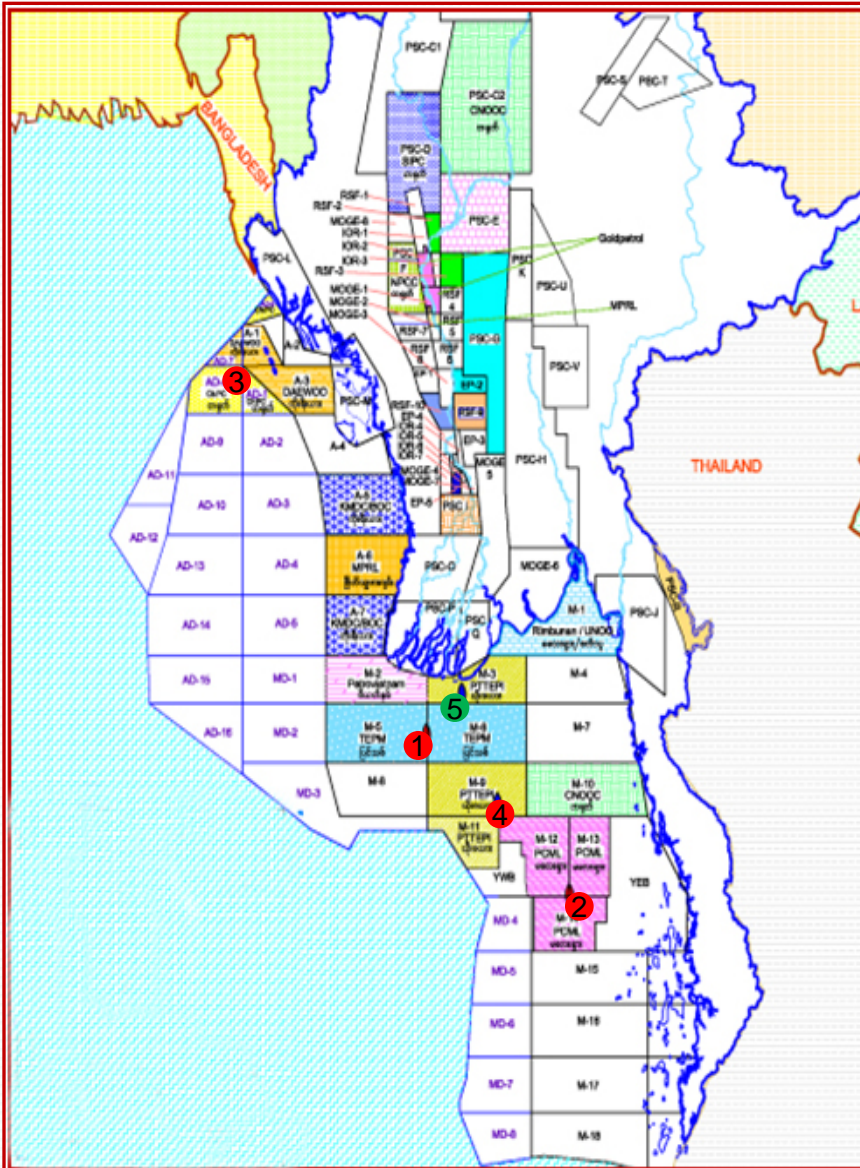
Current Offshore Projects

Onstream Projects

- ❖ Yadana Project - 1998 (Thailand)
- ❖ Yetagon Project - 2000 (Thailand)
- ❖ Shwe Project - 2013 (China)
- ❖ Zawtika Project - 2014 (Thailand)

New Project

- ❖ M-3 Project - 2018 (Only Domestic)

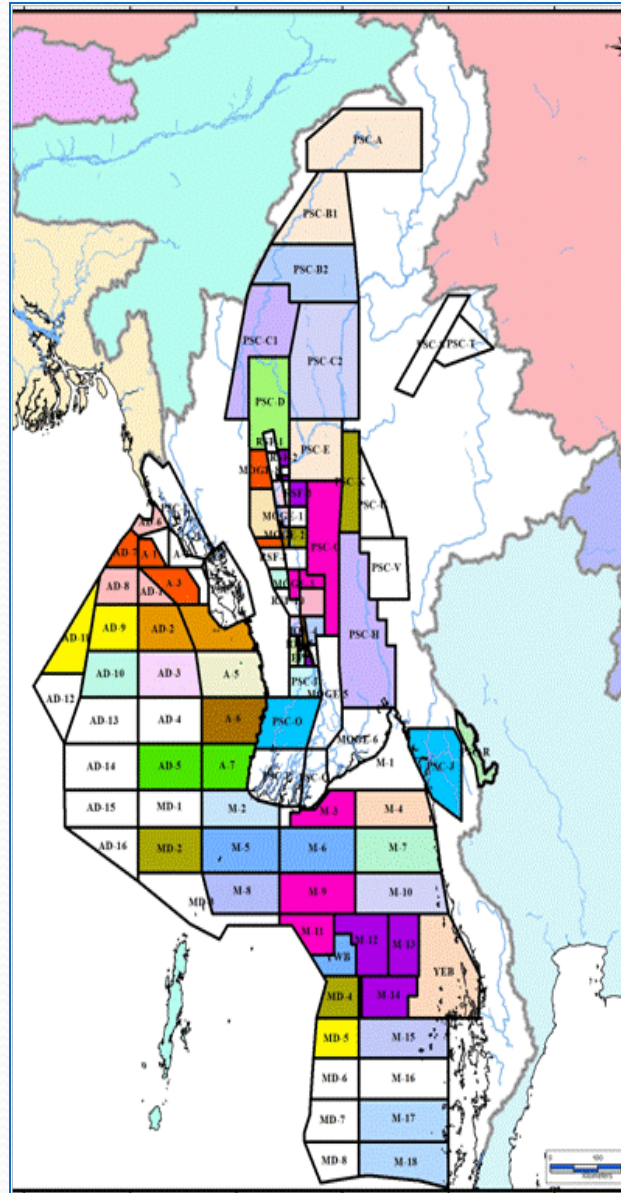


Current International Companies

Onshore and Offshore Blocks

(Onshore 26 blocks)

<u>Company</u>	<u>Block</u>
Nobel Oil	PSC-A
North Petro-Chem	PSC-F
Gold Petro JOC	IOR-2
	MOGE-1
MPRL E&P	MOGE-2
	IOR-4, IOR-6
SNOG, UPR	PSC-R
Geopetrol Intl.	RSF-9
Jubilant Oil & Gas Pvt.	PSC-I
PTTEPI	PSC-G, EP-2
	MOGE-3
Istech Energy Ltd.	EP-5
Asia Orient Intl. Ltd.	PSC-E
Eni Myanmar B.V	PSC-K, RSF-5
ONGC Videsh	PSC-B2, EP-2
Bashneft Int'l B.V	EP-4
Pacific Hunt	PSC-C1, PSC-H
Brunei Petroleum	EP-1,
Petronas Carigali	IOR-5, IOR-7
CAOG	MOGE-4



(Offshore 38 blocks)

<u>Company</u>	<u>Block</u>
TOTAL	- M-5, M-6 , YWB
PETRONAS	- M-12, M-13 , M-14
DAEWOO	- A-1, A-3, AD-7
PTTEPI	- M-3, M-11, M-9 - MD-7, MD-8
CNPC	- AD-1, AD-6, AD-8
MPRL E&P	- A-6
PETROVIETNAM	- M-2
BG/ Woodside	- A4, AD-2
Woodside/ BG	- A-7, AD-5
UNOCAL	- A-5
Oil India	- M-4, YEB
Tap Energy	- M-7
Berlanga	- M-8
TRG/ CFG	- M-15
Relience	- M-17, M-18
Ophir	- AD-3
Shell	- AD-9, AD-11, MD-5
Statoil	- AD-10
Eni Myanmar	- MD-2, MD-4

Current Performance of Myanmar Oil and Gas Enterprise (MOGE)

- **Present in Onshore: 12 oil fields and 5 gas fields (Total 17 fields)**
- **Present in Offshore: 4 producing fields and 1 field under development**
 - **PSC Contracts are Basic Contract for E&P**
 - **IPR Contracts for existing oil and gas fields**
 - **26 onshore blocks (10 PSCs, 5 IORs, 4 MOGEs, 2 RSFs and 5 EPs) and 38 offshore blocks (22 shallow and 16 deep water blocks) are being operated**
- **Unconventional prospects FS for Onshore area**

International Bidding Round (Update)

1st Onshore bidding round for 18 blocks has been opened in 2011

- 6 Companies are operating in 8 Blocks for their E& P Activities.

2nd Onshore bidding round for 18 blocks has been opened in Oct 2013

- 9 Companies are operating in 14 Blocks for their E& P Activities.

1st Offshore bidding round for 30 blocks has been opened in March 2014

- 13 Companies are operating in 20 Blocks for their EIA & SIA Activities.

Opportunities in Upstream Sector

1. Onshore-Offshore E&P Activities under PSC basic when bidding coming out.
2. Improving recoverable volume in marginal fields by applying EOR or reliable technologies in its deeper prospects when launching the Tender.
3. Rehabilitating to suspended fields: onshore area
4. Unconventional prospects: Onshore area
5. Supply based for Onshore and Offshore E&P at SEZ on favorable shore/land location.
6. JV process for drilling, seismic and transportation



V. Current Status of Downstream Sectors

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)

Opportunities in Petrochemical Sector

- ✓ New Refinery (*plan a new refinery of 56,000 bpd*) along the *Myanmar- China Pipeline Route JV* with MPE
- ✓ New Petrochemical Plants
- ✓ Liquefied Petroleum Gas (LPG) distribution JV with MPE and local Partners
- ✓ Upgrading of Existing Thanlyin Refinery and Nyaungdone LPG Plant: JV system
- ✓ Research and Development, e.g. Laboratory, Process etc.
- ✓ Supply equipments spare for Factories and Plants

Opportunities in Downstream Marketing Sector

- ✓ **Trading and Marketing of Petroleum Products in accordance with MIC Guidelines and Regulations**
- ✓ **Contemporary Transportation Units**
- ✓ **Fuel terminal and filling stations around country**
- ✓ **Indispensable equipments**
- ✓ **JV process for Aviation Turbine Fuel (ATF) distribution at the Airport and other Petroleum distribution services**

VI. Conclusion

Priority and Opportunities

- 1. Exploration and Production in petroliferous Onshore and Offshore Myanmar Basins on International Bidding basis when we launched**
- 2. Rehabilitating to marginal oil fields; and Enhancing to (declined) oil fields and suspended fields by tendering**
- 3. JV process for drilling, seismic and transportation**
- 4. JV process for Existing Refinery , LPG and Petroleum movement**
- 5. Trading and Marketing of Petroleum Products**
- 6. Research and Development**

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FOR YOUR KIND ATTENTION