

**INVEST  
BRUNEI  
DARUSSALAM**

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**“Together We Flourish”**

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# WAWASAN BRUNEI 2035: OUR NATIONAL VISION



## DYNAMIC & SUSTAINABLE ECONOMY

Top 10 Countries  
In The World  
In Terms Of  
Income Per Capita



## HIGH QUALITY OF LIFE

Top 10 Countries  
In The World  
According To The  
UNDP Human  
Development Index



## EDUCATED, HIGHLY SKILLED & ACCOMPLISHED PEOPLE

Based On The  
Highest  
International  
Standards

## WAWASAN BRUNEI 2035

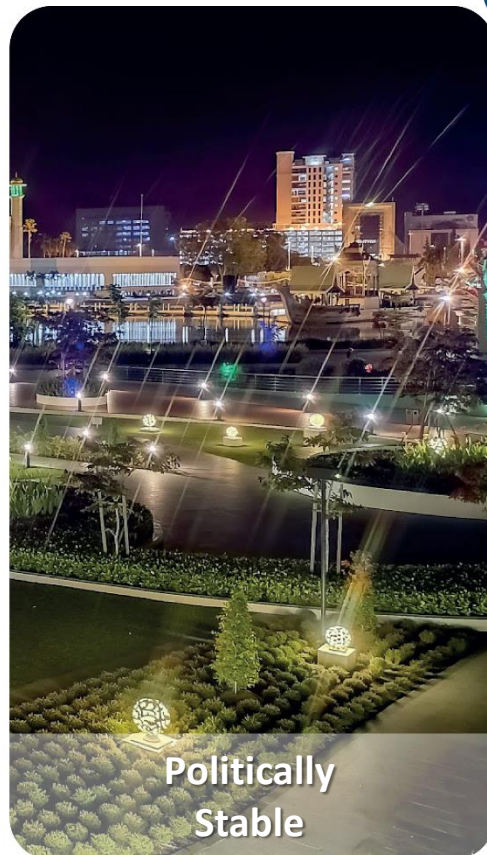
GOAL 1

GOAL 2

GOAL 3

# WHY INVEST IN BRUNEI DARUSSALAM

INVEST  
BRUNEI  
DARUSSALAM



Favourable  
Tax Regime



Ease of Doing  
Business Reform



Credible  
Partnership



Intellectual Property  
Protection



Up to 100%  
Foreign Ownership



Complete  
Facilitation

# QUALITY LIVING

## High Quality Environment

- No history of Natural Disasters
- Ranked No. 8 globally for Air Quality (2018)



## High Class Medical Facilities

- Well-equipped facilities such as JPMC, PJSC, TBCC and BNSRC



## Good Education System

- International Schools such as JIS & ISB
- 97.1% Literacy Rate (2018)



## Well Connected & Strategically Located

- ASEAN Free Trade Agreements (AFTA) provides greater market reach



## Good Infrastructure Ready

- 99.9% Coverage in Electricity & Water Supply (2018)



## Low Crime Rate



# GLOBAL CONNECTIVITY



# GLOBAL CONNECTIVITY



## Partner Shipping Line

MAERSK LINE Maersk Line	PIL Pacific International Lines	EVERGREEN GROUP Evergreen Group	COSCO SHIPPING China Ocean Shipping Company
MTT MTT Shipping Sdn. Bhd.	AMANN SHIPPING Amann Shipping Sdn Bhd	Hapag-Lloyd Hapag-Lloyd	OOCL Orient Overseas Container Line
APL APL	ACL ACL Cargo	CMA CGM CMA CGM Group	Harbour Harbour Link Line Sdn Bhd
NYK LINE NYK LINE	K LINE K LINE	MOL Mitsui O.S.K. Lines	MSC Mediterranean Shipping Company

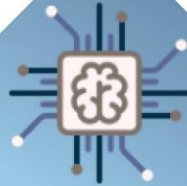


Muara Port is currently operated by Muara Port Company Sdn Bhd (MPC), a joint venture company formed between Darussalam Assets Sdn Bhd and Beibu Gulf Holding (Hong Kong) Co. Ltd.

# PRIORITY INVESTMENT CLUSTERS



Oil & Gas  
Downstream



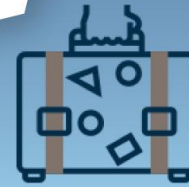
ICT



Services



Food



Tourism

# HOW TO INVEST INTO BRUNEI DARUSSALAM

STEP  
1

## SUBMIT YOUR INVESTMENT PROPOSAL

To FDI Action & Support Centre (FAST), Brunei Economic Development Board (BEDB)

STEP  
2

## EVALUATION & APPROVAL OF YOUR INVESTMENT PROPOSAL

By FDI & Downstream Industry Working and Steering Committee

STEP  
3

## RECEIVE COMPLETE FACILITATION & AFTERCARE

From FAST, BEDB





# ESTABLISHED INTERNATIONAL COMPANIES

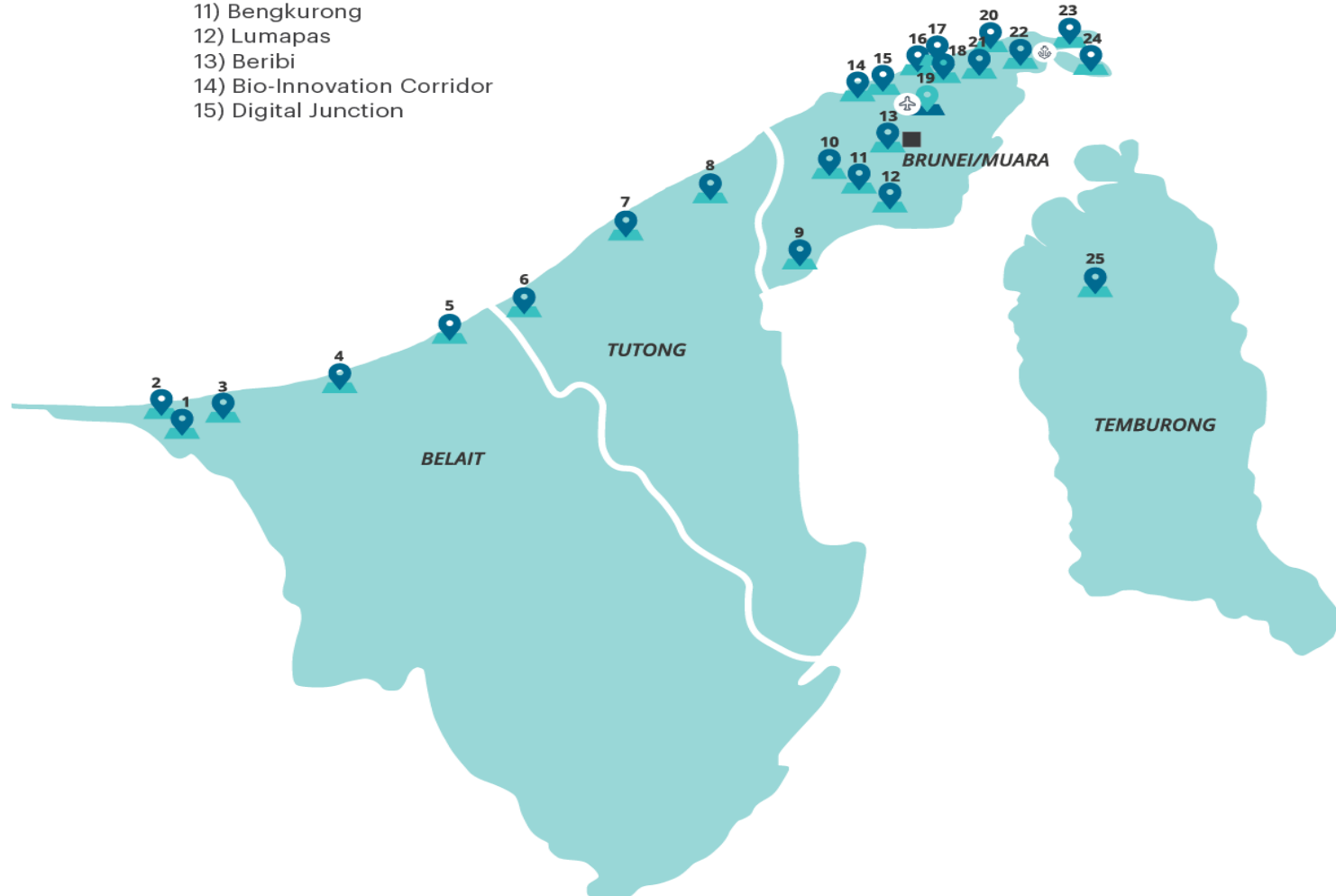


# INDUSTRIAL SITES

- 1) Sungai Duhon
- 2) Pekan Belait
- 3) Mumong
- 4) Sungai Bera
- 5) SPARK
- 6) Telisai
- 7) Serambangun
- 8) Bukit Panggal
- 9) Kuala Lurah
- 10) Mulaut
- 11) Bengkurong
- 12) Lumapas
- 13) Beribi
- 14) Bio-Innovation Corridor
- 15) Digital Junction

- 16) Terunjing (FTZ)
- 17) Lambak Kanan West
- 18) Lambak
- 19) Anggerek Desa Tech Park
- 20) Tanjung Kajar
- 21) Salambigar
- 22) Salar
- 23) Serasa
- 24) Pulau Muara Besar
- 25) Batu Apoi

-  PORT  
 AIRPORT  
 BANDAR SERI BEGAWAN



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**Investment Opportunities: Downstream Oil & Gas**

# INDUSTRY AT A GLANCE

## Key Upstream Companies



## Key Downstream Companies



## Key Supporting Companies



## Feedstock

Methanol  
Aromatics



Ammonia  
Urea

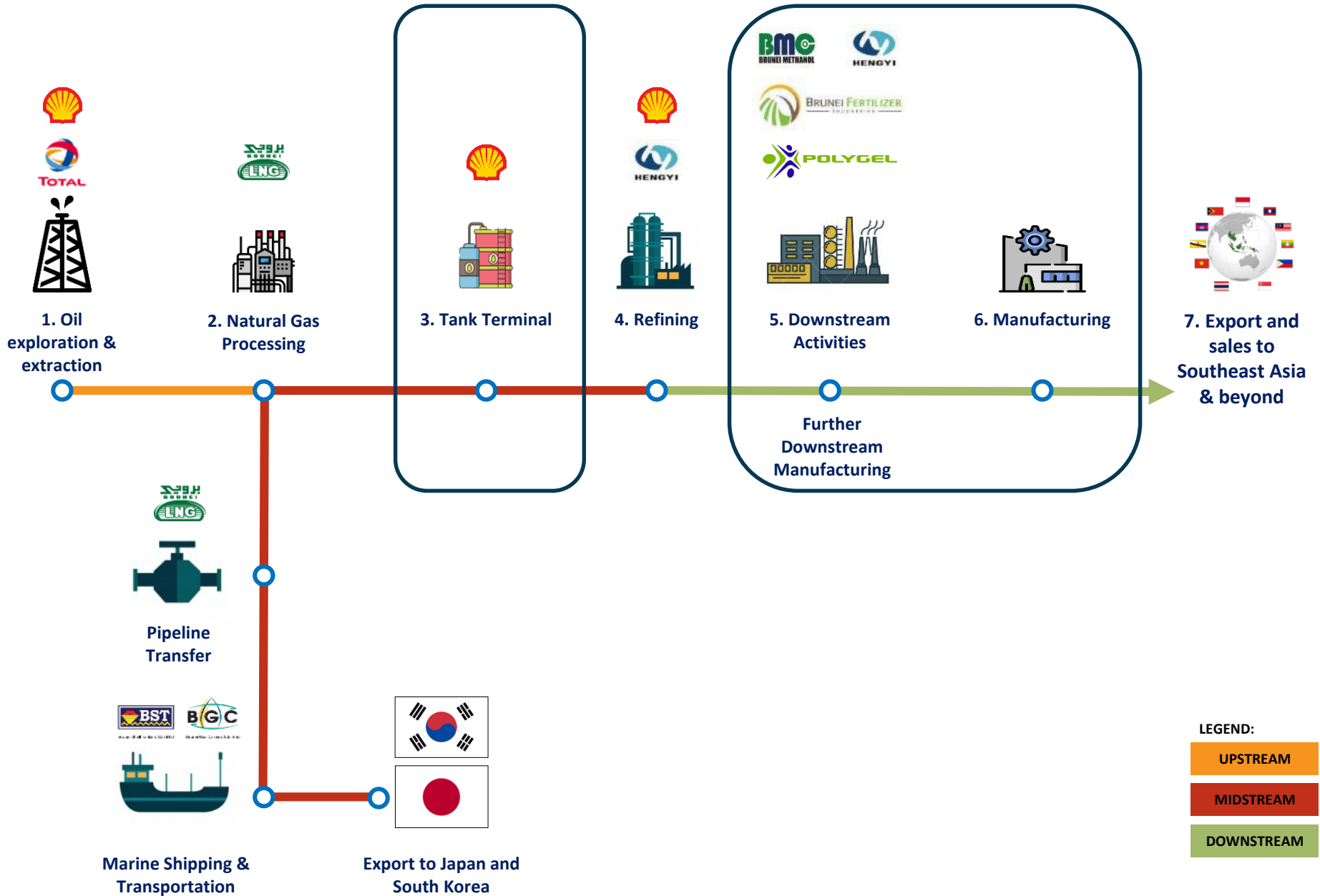
## ASEAN Free Trade Agreements (AFTA)



## Industrial Parks



# ECOSYSTEM



# FEEDSTOCK AVAILABILITY



Benzene

2020



Methanol

2023



Ammonia

Urea

2021

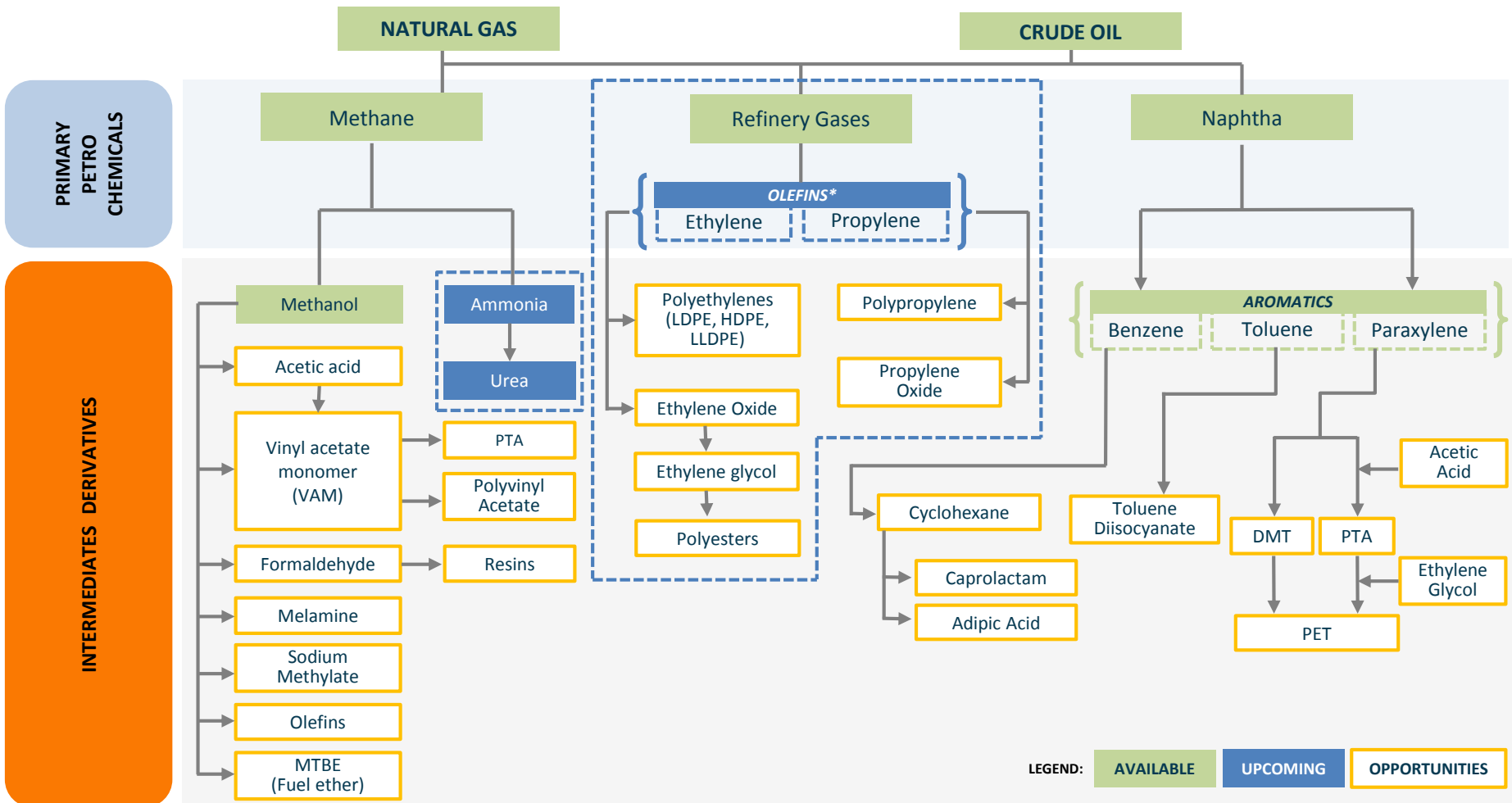


Ethylene

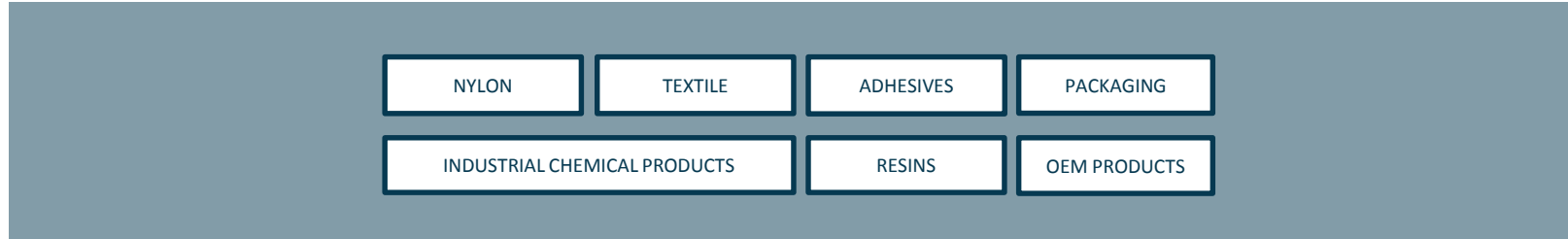
Propylene

2025

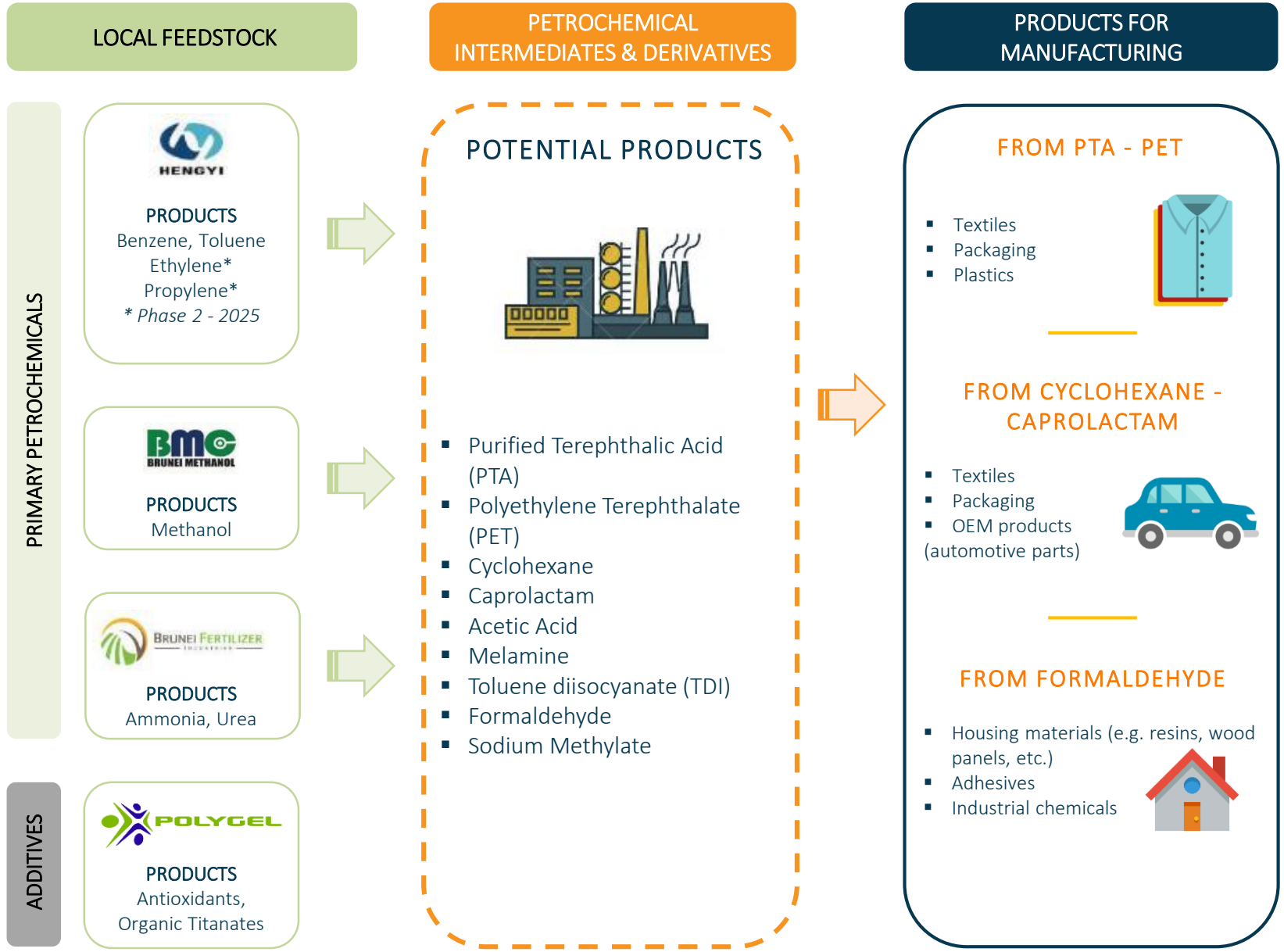
# DOWNSTREAM OPPORTUNITIES



FURTHER  
DOWNSTREAM;  
GROUP OF  
PRODUCTS



# OPPORTUNITY: PETROCHEMICAL INTERMEDIATES & DERIVATIVES





# OPPORTUNITY: STORAGE TERMINAL HUB

## LOCAL PLAYERS



### PRODUCTS

Crude Oil, LNG, Methanol,  
Benzene, Butadiene,  
Toluene, Ammonia, Urea



Supply to  
local players

## STORAGE TERMINAL HUB



BLENDING, DRUMMING,  
WAREHOUSING, TRADING

### VALUE ADDED SERVICES

\*To store and distribute:

- 1) Crude Oil
- 2) LNG
- 3) Refined Products
- 4) Petrochemical Products



EXPORT  
To create a  
trading  
platform



To Southeast Asia  
and beyond



FURTHER  
DOWNSTREAM  
PRODUCTS

PTA, PET, ANILINE,  
ACETIC ACID,  
CYCLOHEXANE,  
CAPROLACTAM

Other  
industries



POTENTIAL FDI

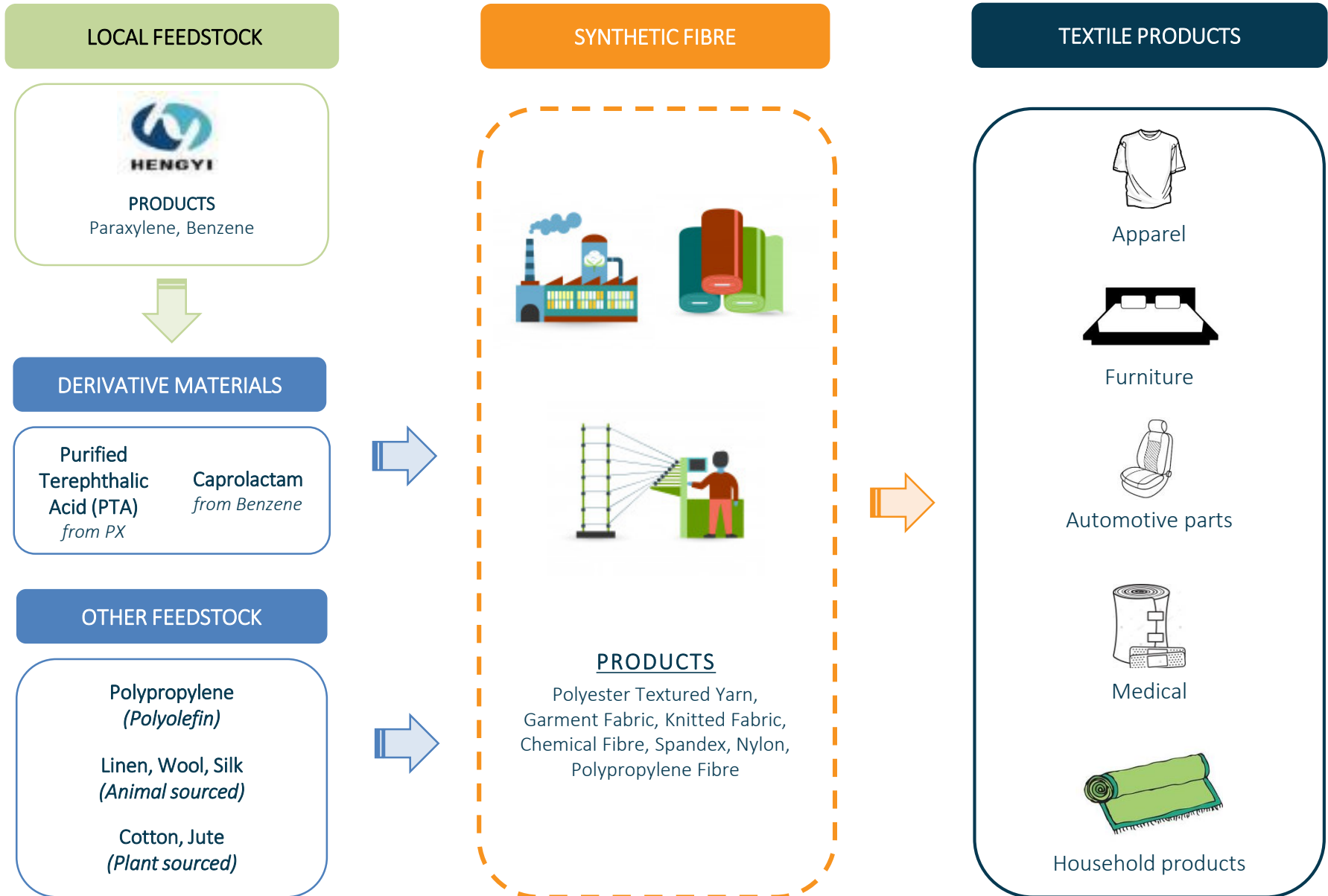
## BORNEO PLAYERS

Lahad Datu Petrochemical Refinery  
Lawas Integrated Refinery

Bintulu LNG Complex



# OPPORTUNITY: DOWNSTREAM MANUFACTURING (TEXTILES)



# OPPORTUNITY: DOWNSTREAM MANUFACTURING (PLASTICS)

## LOCAL FEEDSTOCK

  
**HENGYI**

PRODUCTS  
Benzene

  
**BMC**  
BRUNEI METHANOL

PRODUCTS  
Methanol



## DERIVATIVE MATERIALS

Caprolactam (Polyamide)	Purified Terephthalic Acid (PTA)
Propylene	Ethylene



## SYNTHETIC PLASTICS

TYPE OF PLASTICS

- Polyethylene Terephthalate (PET)
- Low/High Density Polyethylene (L/HDPE)
- Polyvinyl Chloride (PVC)
- Polypropylene (PP)
- Polystyrene (PS)





## PLASTICS PRODUCTS

PET  
Plastic drinking bottles

L/HDPE  
Grocery bag, opaque milk and juice container, shampoo bottles, medicine bottles

PVC  
Toys, detergent bottles, medical tubing, pipe, furniture

PP  
Hot food containers, thermal vests, automotive parts, furniture

PS  
Styrofoam food container, egg cartons, disposable cutlery, bicycle helmet

# OPPORTUNITY: DOWNSTREAM MANUFACTURING (FERTILIZER)

## LOCAL FEEDSTOCK



**PRODUCTS**  
Ammonia and Urea

## OTHER FEEDSTOCK

Phosphoric Acid  
Nitric Acid

## SYNTHETIC CHEMICALS



Ammonium Nitrate

Diammonium Phosphate

Granular Urea

## APPLICATION



Fertilizers for agriculture

# APPENDIX: YOUR HOME IN BRUNEI DARUSSALAM



## PULAU MUARA BESAR (PMB)



# APPENDIX: YOUR HOME IN BRUNEI DARUSSALAM



## SUNGAI LIANG INDUSTRIAL PARK (SPARK)



**Legend**

- Available (Light Blue)
- Future Available (Teal)
- Reserves (Yellow)

# WAY FORWARD



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**Investment Opportunities: Services**



# INDUSTRY AT A GLANCE

## Transport Services



## Communication Services



## Financial Intermediation



## Technical Services



Note: this listing is non-exhaustive.

# OPPORTUNITY: AVIATION MAINTENANCE, REPAIR AND OVERHAUL

## LOCAL RESOURCES



### INFRASTRUCTURE

- Hangar (1 and 3), Rolls Royce Building, Ground Equipment Bay and Line Maintenance facilities,
- Competent authorities (DCA) and regulator, and international accreditation (EASA) etc.



### HUMAN CAPITAL

- High skill level of local engineers (EASA 66 certified) and mechanics
- IBTE Sultan Saiful Rijal Campus provides aviation maintenance related training

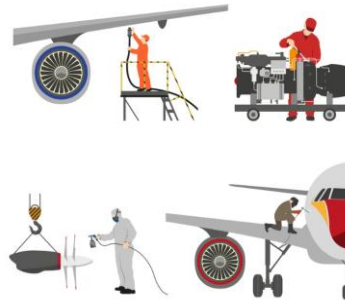
## LOCAL AIRLINES



### PARTNER

- The reputation and image Royal Brunei Airlines has already built as a safe and reliable regional and international airline operator.

## AVIATION MRO FACILITY



Base Maintenance  
Line Maintenance  
Component MRO  
Landing Gear Repair  
Materials Supply  
Engineering Service  
Training Service  
Ground Support  
Part Manufacture Centre  
Freighter Conversion



Available local resources for setup of MRO services

Potential partnership with RB



Supply services to RB aircrafts

Export Services



To Southeast Asia and beyond

# OPPORTUNITY: MARINE MAINTENANCE YARD

## LOCAL DEMAND



Approximately 100 offshore vessels could be serviced at the planned yard

Provide services



## MARITIME CLUSTER

### MARINE MAINTENANCE YARD



SHIPYARD, BUNKERING,  
REPAIR AND  
MAINTENANCE,  
INTEGRATED MARINE  
SUPPLY BASE, SPARE PARTS

Export Services

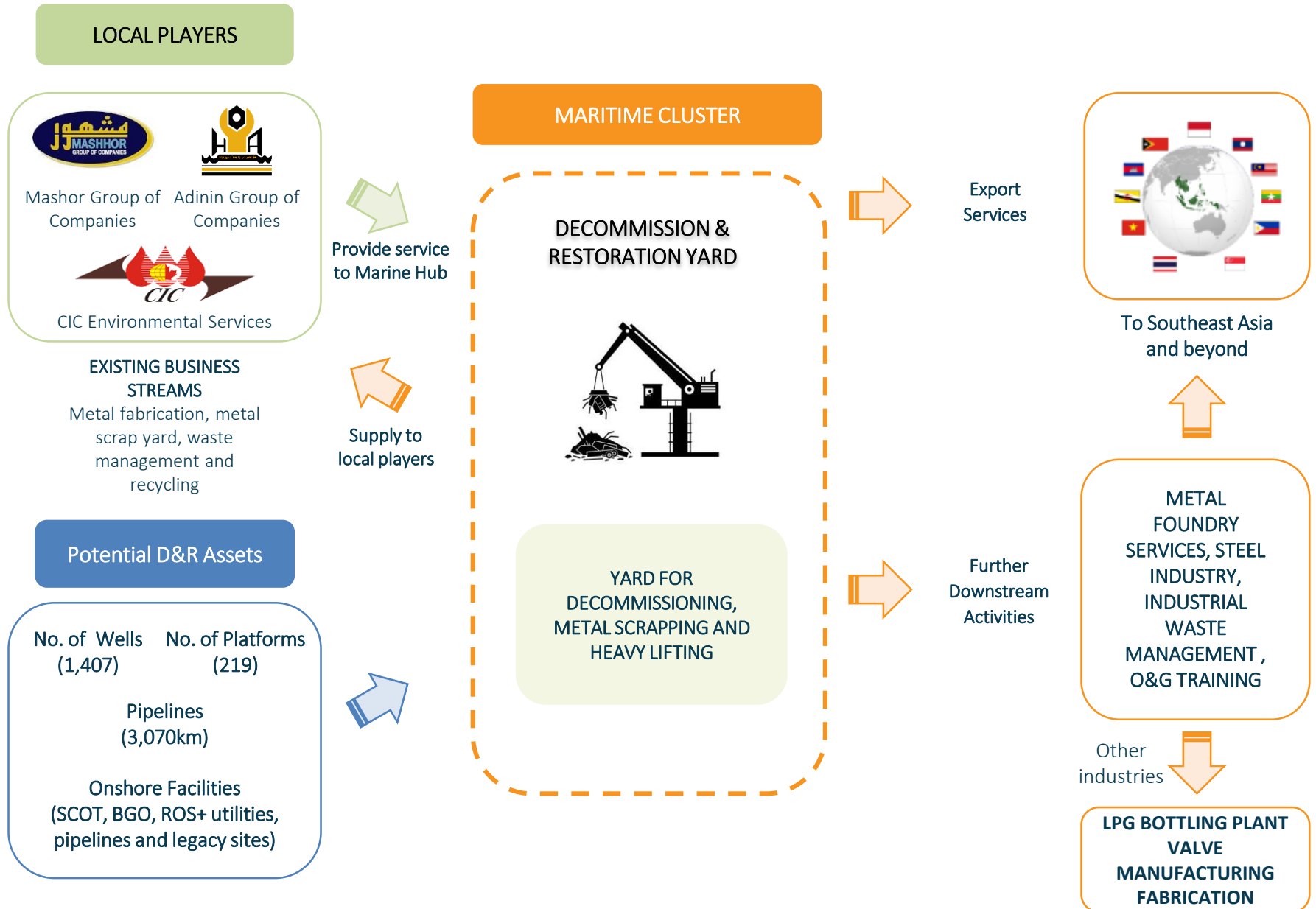


Approximately 100 offshore vessels operating in water around Borneo region



To Southeast Asia and beyond

# OPPORTUNITY: DECOMMISSION & RESTORATION YARD



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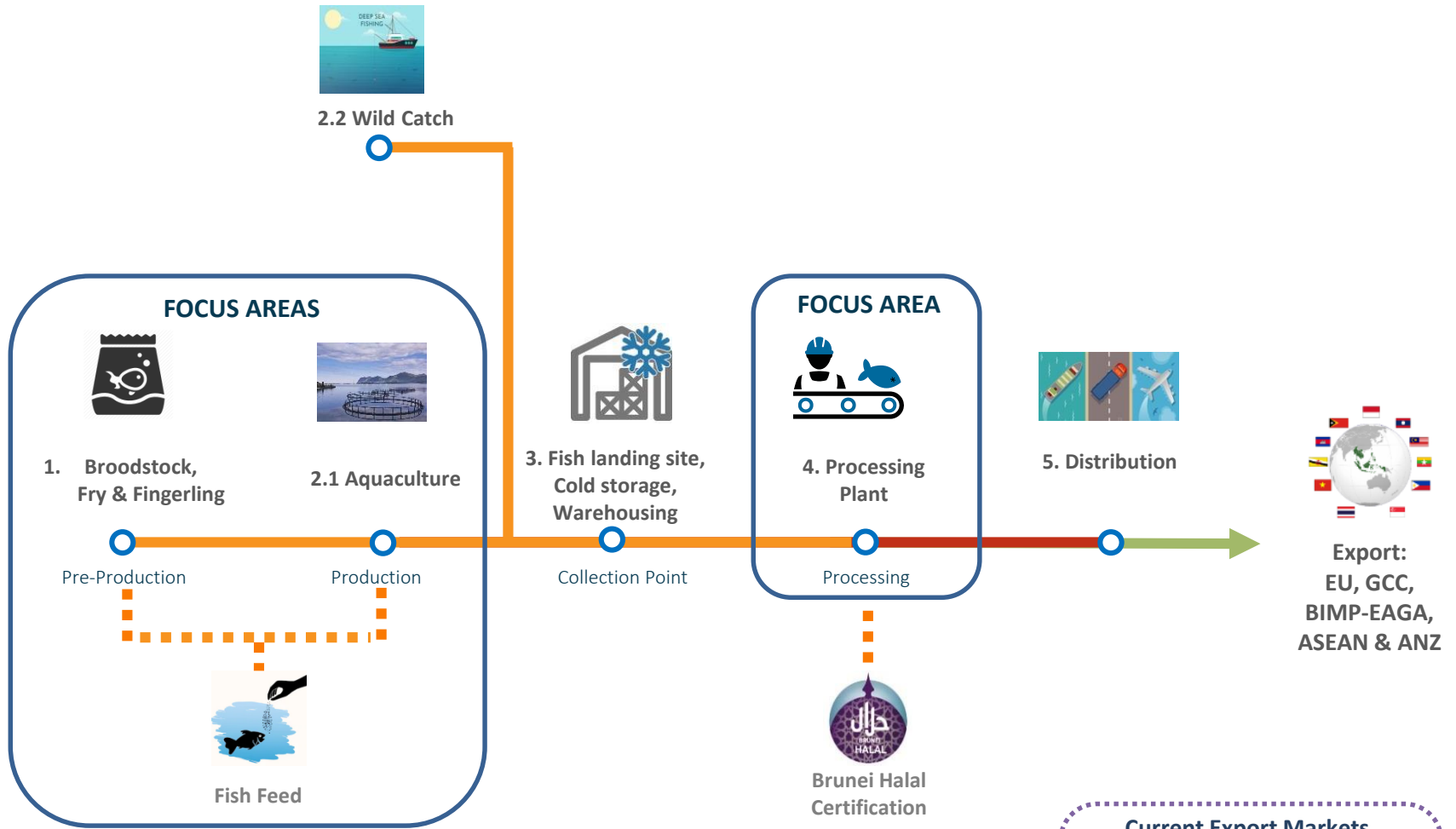
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**Investment Opportunities: Food**

# ECOSYSTEM: FISHERIES



- LEGEND:
- UPSTREAM
  - MIDSTREAM
  - DOWNSTREAM

**Current Export Markets**

- Tuna (China, Japan)
- Grouper (Singapore, Hong Kong)
- Blue Shrimp (China, Japan, Korea, Australia)
- Golden Pompano (Canada, USA)

# OPPORTUNITY: AQUACULTURE (INTEGRATED)

## LOCAL VALUE PROPOSITIONS

Conducive environment for high value species

Offshore, Inshore & Inland sites

Aquaculture FDIs successfully exported



## SPECIES

### Fish:



**Red Sea Bream**  
(Inshore, Offshore)



**Trout**  
(Inland)



**Grouper**  
(Inshore, Offshore)



**Sea Bass**  
(Inshore, Offshore)

### Non-Fish:



**Tiger Prawn**  
(Inland)



**Scallop**  
(Inland)



**Mud Crab**  
(Inland)



**Abalone**  
(Inland)



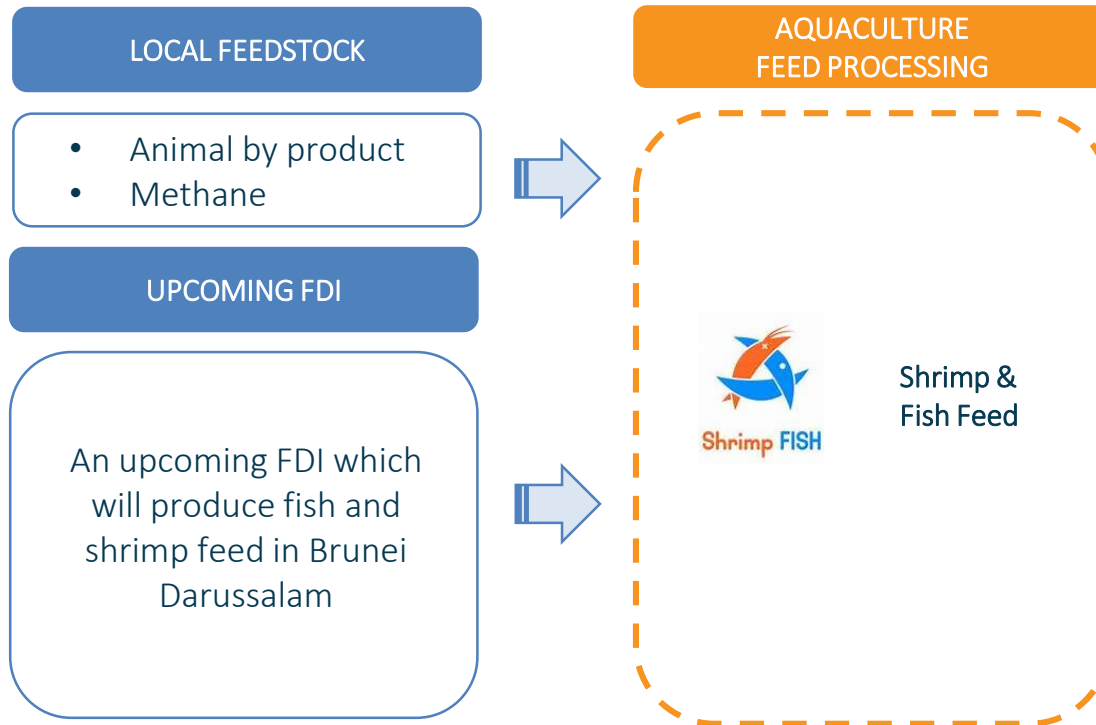
## AQUACULTURE PROCESSING



**Fresh, Chilled & Frozen Seafood**

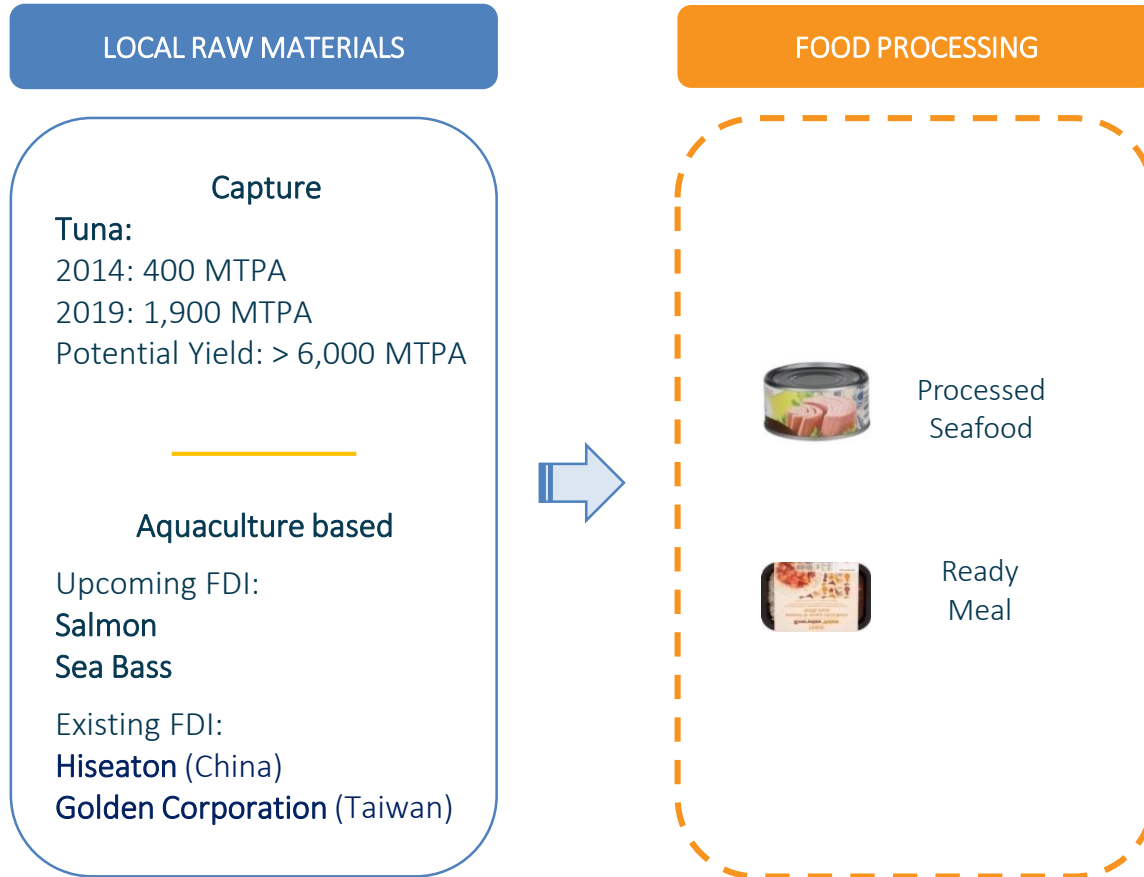


# OPPORTUNITY: AQUACULTURE (FEED PROCESSING)

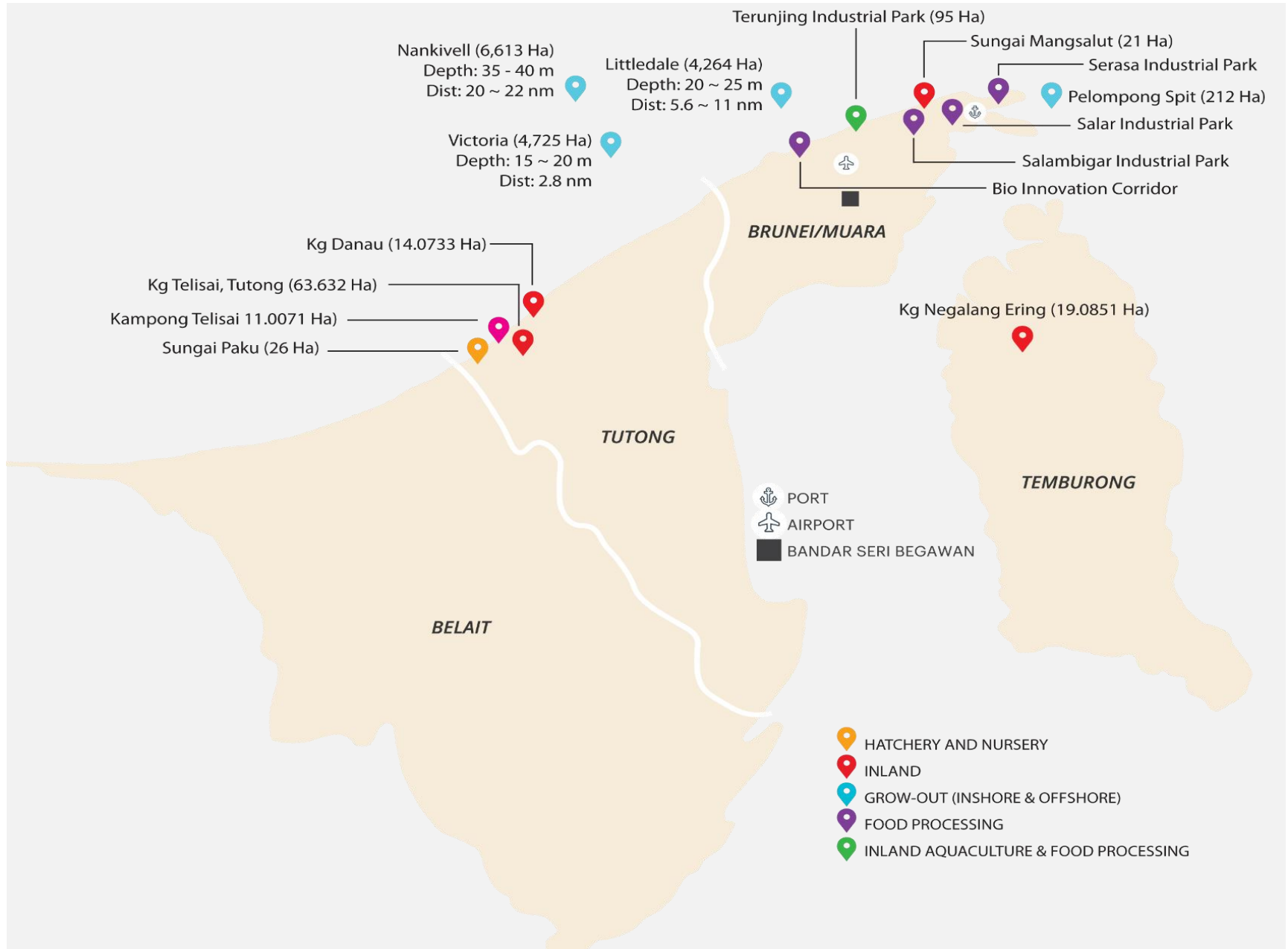




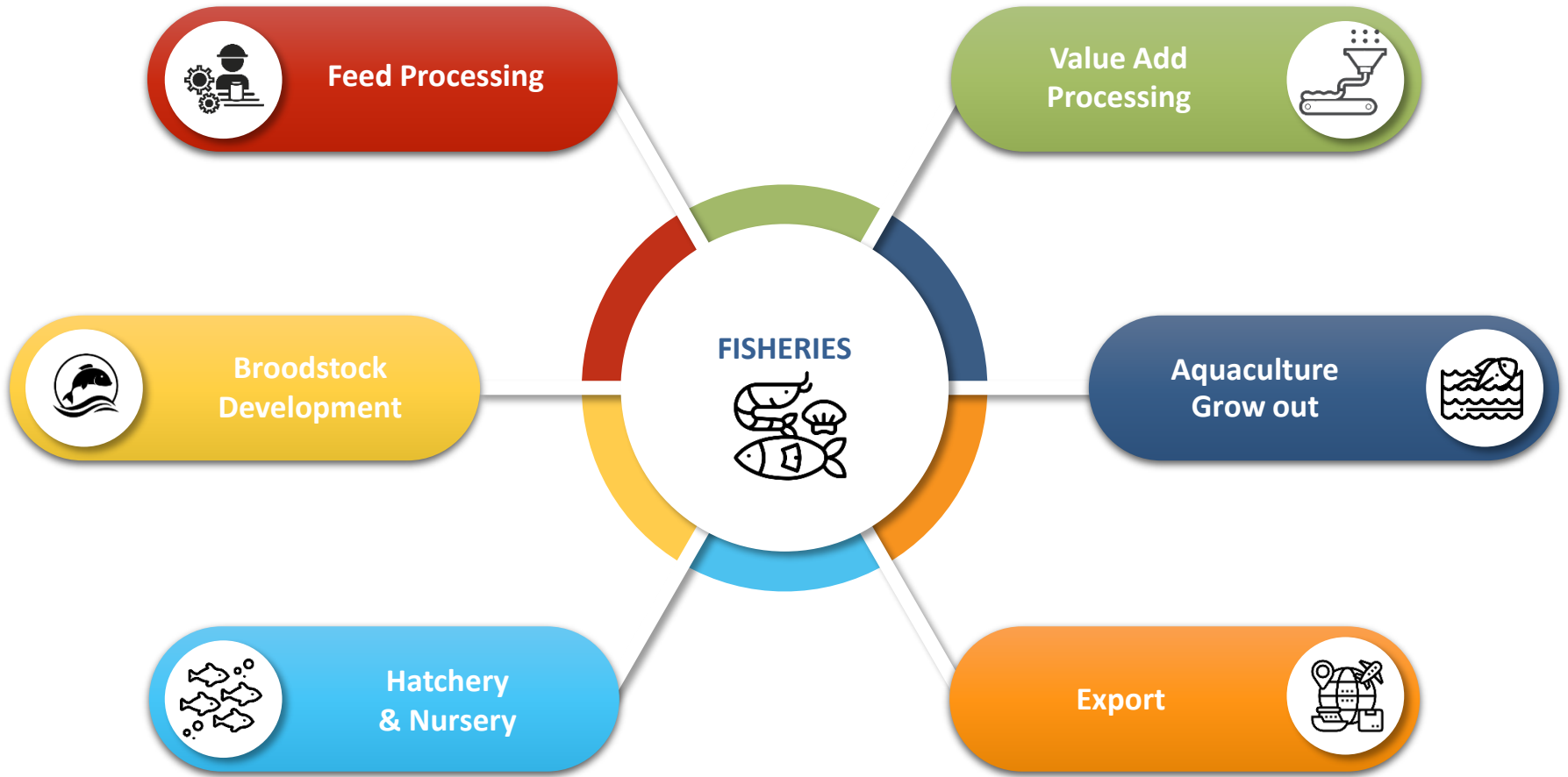
# OPPORTUNITY: FURTHER SEAFOOD PROCESSING



# POTENTIAL SITES: FISHERIES



# WAY FORWARD



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**Investment Opportunities: Tourism**

# BRUNEI DARUSSALAM: YOUR GATEWAY INTO BORNEO



# INDUSTRY AT A GLANCE

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DARUSSALAM

## PRISTINE RAINFOREST



**75% Pristine Rainforest Cover,  
2<sup>nd</sup> Cleanest Urban Air**

## RICH BIODIVERSITY



**Endemic Wildlife  
& Plants**

## UNIQUE CULTURE



**Malay Islamic Monarchy,  
our unique identity**

## LUXURY ACCOMMODATION

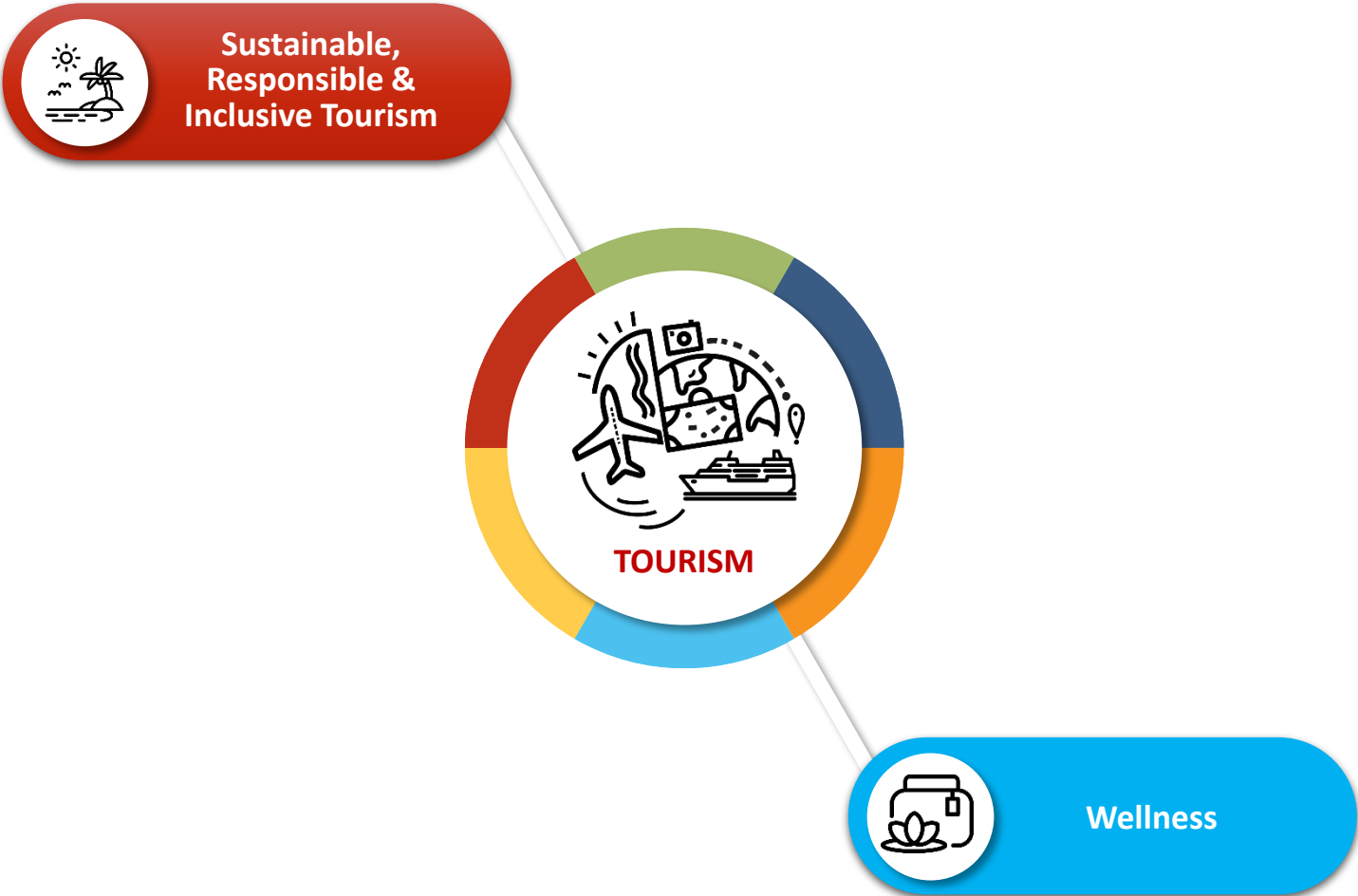


**5 Star Luxury Resort with In-house  
Cinema, Bowling Alley & Golf Course**

## HIGH QUALITY MEDICAL SERVICE



**Advance Medical Services,  
incl. Cardiac, Cancer, etc.**



# OPPORTUNITY: SUSTAINABLE, RESPONSIBLE & INCLUSIVE TOURISM

## NATURAL ASSETS



PRISTINE  
RAINFOREST



RICH DIVERSITY  
IN WILDLIFE



UNIQUE  
CULTURE



CORAL &  
SHIPWRECKS

## INVESTMENT OPPORTUNITIES



ECO RESORT/  
LODGE



ECO  
ENTERTAINMENT  
PARK



## SUPPORTING ACTIVITIES / LOCAL PLAYERS

Specialist Nature  
Guide

Nature Adventure  
Operator

Food & Beverage  
Industry

Farming

Research

Nature / Wildlife  
Conservation /  
Restoration

Local Homestay

Local  
Transportation

Retail

Green Technology



# OPPORTUNITY: WELLNESS

## NATURAL ASSETS



2<sup>nd</sup> CLEANEST  
URBAN AIR IN  
THE WORLD



ASEAN HERITAGE  
PARK



SAND, SEA  
& WILD NATURE



LOCAL RAW  
MATERIALS

## INVESTMENT OPPORTUNITIES



WELLNESS  
RESORT



WELLNESS  
SPECIALIST



## SUPPORTING ACTIVITIES / LOCAL PLAYERS

Local Healthcare

Wellness Program

Healthy Eateries

Nature Adventure  
Operator

Local Cosmetic /  
Wellness Products

Fitness  
Mind & Body

Local  
Transportation

Retail

Sports &  
Recreation

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**Investment Opportunities: ICT**

# INDUSTRY AT A GLANCE

## Key Infrastructure



فرساتوان بڠكا بروني  
THE BRUNEI ASSOCIATION OF BANKS

## Key Governance



اتوڠرڠي مونيتاري بروني دارالسلام  
AUTHORITY MONETARY BRUNEI DARUSSALAM

Digital Economy Council

## Industrial Parks



## Foreign Companies



## Research & Innovation



University of  
Brunei Darussalam

University of  
Technology Brunei



## Key Technology Start Ups



# OPPORTUNITIES: EMERGING TECHNOLOGIES

## LOCAL PLAYERS

### MEDICAL AI & BIG DATA



### TECHNOLOGY RESEARCH CENTRES



### INNOVATION CENTRES AND LABS



## RESEARCH SERVICES

Centre of Advanced Material and Energy Sciences

Centre for Transport Research

Centre of Advanced Research

Centre for Research on Agri-Food Science and Technology

Institute for Biodiversity and Environmental Research

Centre for Innovative Engineering

## TECHNOLOGY COMPANIES & START UP SERVICES

Media and Entertainment

Islamic

Animation

E-Commerce

Education

Programming

Fashion

E-Sports

Health and Lifestyle

Food and Beverages

E-Hailing

Event Management

Data Analytics

Agriculture

Financial Technology

## VALUE ADDED SERVICES



Smart Agriculture



Smart Sustainable Cities



E-commerce Inventory Management



Smart Healthcare



Smart Citizens



Smart Transportation



Advanced Manufacturing and Processing



Knowledge Process Outsourcing



Creative Learning

## FDI OPPORTUNITIES

### POTENTIAL FDI

DATA ANALYTICS

ARTIFICIAL INTELLIGENCE

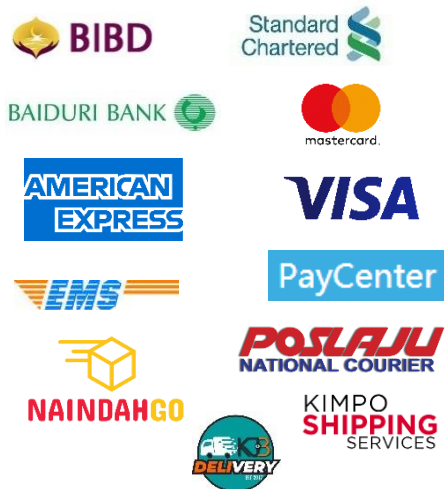
# OPPORTUNITIES: E-COMMERCE

## LOCAL PLAYERS

### KEY ECOMMERCE WEBSITES



### OTHERS (WITHIN VALUE CHAIN)



### PRODUCTS

Clothing	Jewellery	Electronics	Automotive
Accessories	Shoes	Beauty & Health	Stationery
Sports	Home & Living	Books	Music
Groceries	Coupon Deals	Event Bookings	Workshops

### SERVICES

Shipping
Tracking
Delivery
Payment System
Customer Services

## FDI OPPORTUNITIES

### POTENTIAL FDI

CENTRALIZED  
ECOMMERCE  
PLATFORM

E-COMMERCE  
FULFILLMENT  
HUB

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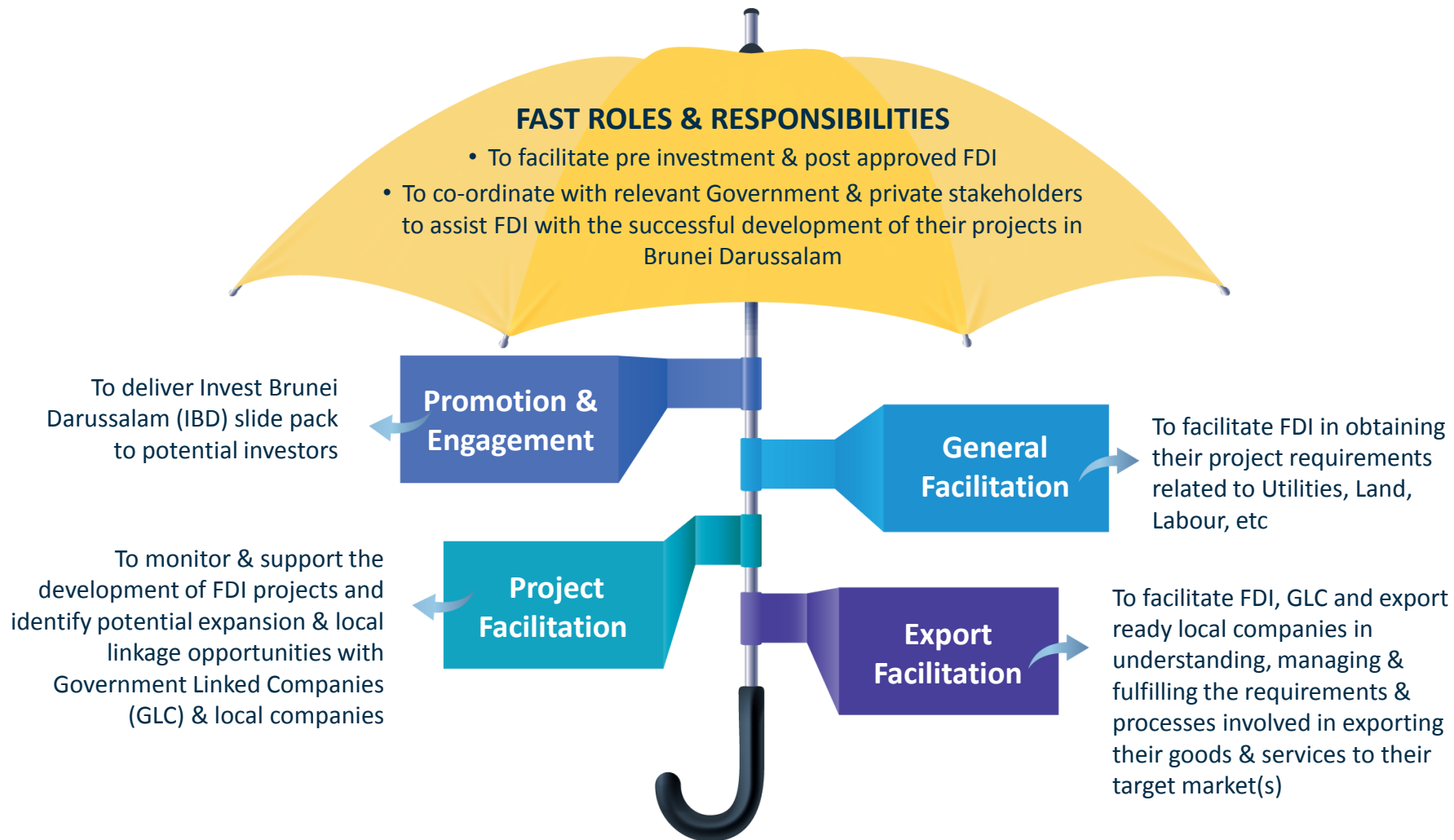
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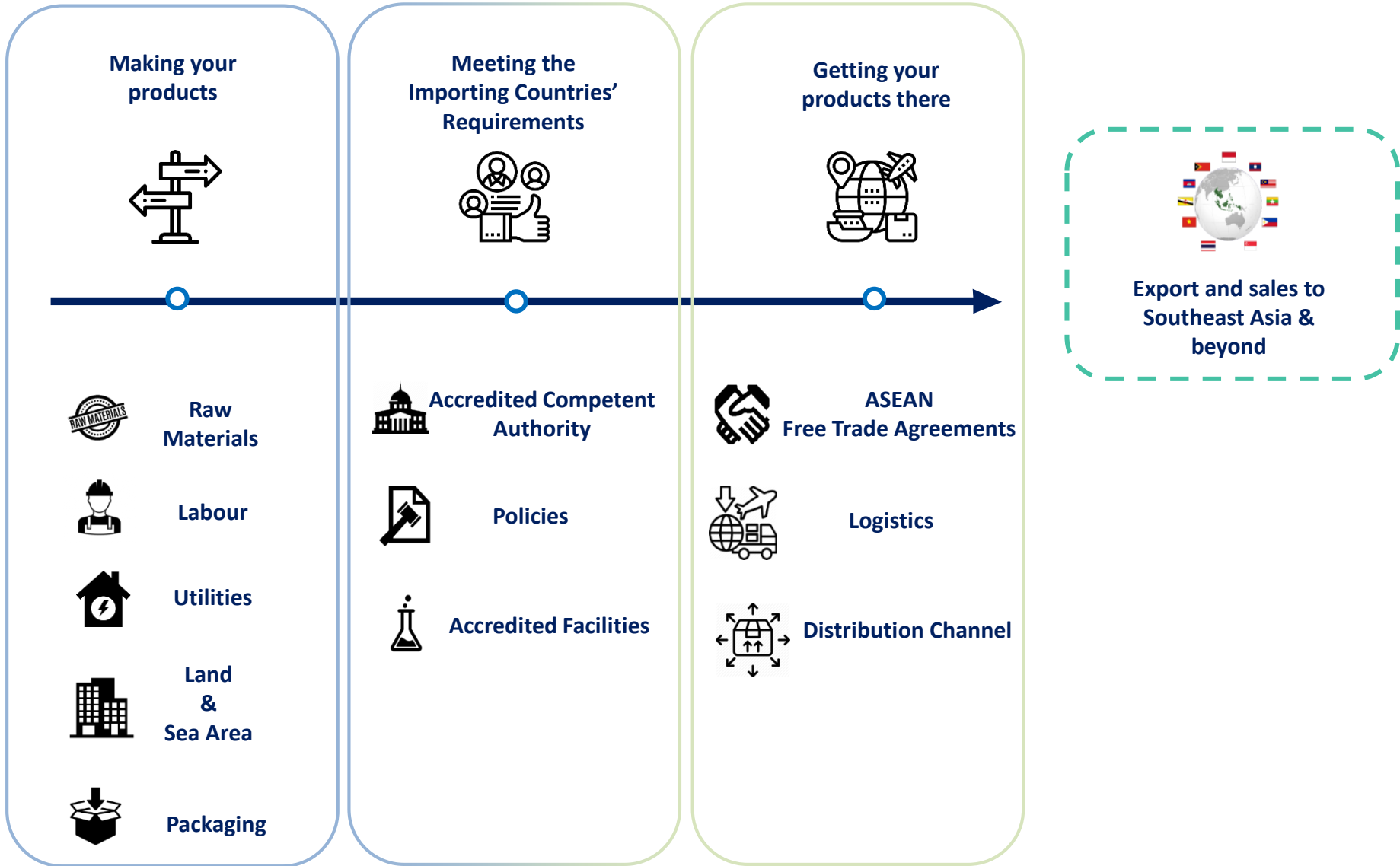
**FAST: Facilitating Your Investment Requirements**

## MINISTRY OF FINANCE & ECONOMY (MOFE) OBJECTIVE

To engage & support more value added Foreign Direct Investment (FDI) in Brunei Darussalam



# EXPORT ECOSYSTEM





# MARKET ACCESS: IMPORT EXPORT PROCEDURE

## IMPORTER

- Register with the Registry of Companies & Business Names (ROCBN) to obtain company registration number.

- Register with the Royal Customs & Excise Department (RCED) via Brunei Darussalam National Single Window (BDNSW) or appoint forwarder already registered with RCED.

### Required Documents

Below are essential documents needed to import into Brunei Darussalam:

- Bill of Lading;
- Shipping Delivery Order;
- Commercial Invoice;
- Packing List;
- Import Permit;
- Customs Import Declaration; and
- Certificate of Origin

### Import Tariff

- Majority of products do not incur import duties. Those that do are levied at either 5% or 10%.
- For goods imported from non ASEAN countries, Brunei Darussalam follows the Harmonised Tariff system.
- For goods imported from ASEAN countries, Brunei Darussalam follows the ASEAN Harmonised Tariff Nomenclature.

## EXPORTER

- Register with the Registry of Companies & Business Names (ROCBN) to obtain company registration number.

- Register with the Royal Customs & Excise Department (RCED) via Brunei Darussalam National Single Window (BDNSW) or appoint forwarder already registered with RCED.

### Required Documents

Below are essential documents needed to export from Brunei Darussalam:

- Bill of Lading;
- Commercial Invoice;
- Customs Export Declaration;
- Packing List;
- Insurance Certificate;
- Export Permit; and
- Certificate of Origin.

### Export Tariff

- Brunei Darussalam does not impose export duties on exported products.

# MARKET ACCESS: CURRENT TRADE AGREEMENTS

## FREE TRADE AGREEMENT

	<b>Enter into force</b>
ASEAN TRADE IN GOODS AGREEMENT (ATIGA)	May 2010
ASEAN – AUSTRALIA – NEW ZEALAND FREE TRADE AGREEMENT (AANZFTA)	January 2010
ASEAN – CHINA FREE TRADE AGREEMENT (ACFTA)	July 2005
ASEAN – INDIA FREE TRADE AGREEMENT (AIFTA)	January 2010
ASEAN – JAPAN FREE TRADE AGREEMENT (AJFTA)	December 2008
ASEAN – KOREA FREE TRADE AGREEMENT (AKFTA)	June 2007

## BILATERAL AGREEMENT

Brunei – Japan Economic Partnership Agreement (BJEPA)

## NEGOTIATION IN PIPELINE

Regional Comprehensive Economic Partnership (RCEP)

# BRUNEI DARUSSALAM : OVERALL LOGISTICS PLAYERS

## MAIN PORT OPERATOR



شركة فلا بو هن مو ارا سن دي رين بر حد  
SYARIKAT PELABUHAN MUARA SDN BHD  
MUARA PORT COMPANY SDN BHD

**121**

**FORWARDING  
AGENTS**

Registered under Royal  
Customs and Excise  
Department (RCED)

**2**

**MAJOR  
AIRLINES**

Royal Brunei & Singapore  
Airlines have the capacity  
to carry cargo

**7**

**SHIPPING  
LINES**

Calling at Muara Port  
\*Evergreen: Main line  
operator

**BRUNEI INTERNATIONAL AIR  
CARGO CENTRE (BIACC)**



BIACC

ありがとうございました شڪرا 謝謝

**TERIMA KASIH** THANK YOU

धन्यवाद JE VOUS REMERCIE

**FDI Action & Support Centre (FAST)  
Brunei Economic Development Board (BEDB)**



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