



# INVEST IN BRUNEI DARUSSALAM

JANUARY 2024

**BEDB**  
BRUNEI DARUSSALAM

# BRUNEI DARUSSALAM

The Abode of Peace



## POPULATION

445,400  
(As of 2022)



## LAND AREA

5,765 sq.km



## EXPORTS

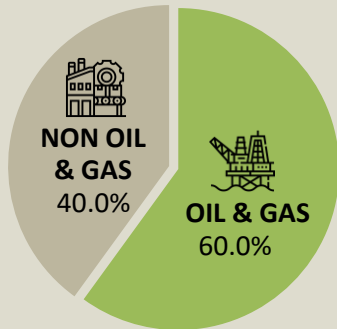
(JAN-SEP 2023)  
BND\$13.7 billion



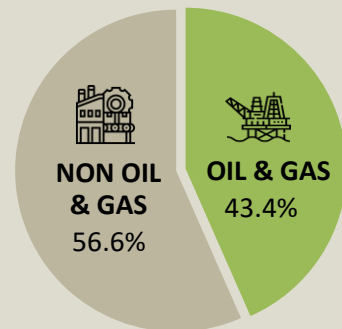
## TOP 3 EXPORTS

(As of 2023)

1. MINERAL FUELS
2. CHEMICALS
3. MACHINERY AND TRANSPORT EQUIPMENT



2010-2019



JAN - SEP 2023





# Why Invest in Brunei Darussalam?

- ▶ Strategic location
- ▶ Political stability and tranquility
- ▶ Good connectivity & access to markets
- ▶ Available Investment Incentives
- ▶ Clean & Green
- ▶ Highly Educated & Skilled Workforce
- ▶ Favourable Tax Climate
- ▶ Co-Investment Partnership
- ▶ Conducive Business Environment
- ▶ Dedicated Industrial Parks





# HIGH QUALITY OF LIFE

## Good Education System



- University such as UBD & UTB
- International Schools such as JIS & ISB
- 97.1% Literacy Rate (2018) \*

## Clean & High Quality Environment



- No history of Natural Disasters
- Ranked No. 8 in Air Quality in 2018 (Environmental Performance Index)

## High Class Medical Facilities



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

## Well Connected & Strategically Located



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

## Good Infrastructure Ready



- 99.9% Coverage in Electricity Supply, and Water Supply (2018) \*

## Low Crime Rate



\*Source: Department of Economic Planning and Statistics, Ministry of Finance and Economy, Key Indicators 2018 and Yale Center for Environmental Law & Policy, and Center for International Earth Science Information Network at Columbia University

# CONNECTIVITY: AIR ROUTES




**Royal Brunei Airlines**, the flag carrier of Brunei, soars across Southeast Asia, the Middle East, Europe, and Australia, offering a touch of Bruneian hospitality to wherever you're headed.

—●— RB's Current Routes    ·····●···· Codeshare Airlines    - - - - -●- - - - - Interline Partners



# CONNECTIVITY: SHIPPING LINES

## CHINA



Muara Port is currently operated by



a joint venture company formed between

دارالسلام است  
Darussalam Assets



MAERSK LINE Maersk Line	PIL Pacific International Lines	長榮集團 EVERGREEN GROUP Evergreen Group	COSCO SHIPPING China Ocean Shipping Company	MTT MTT Shipping Sdn Bhd	APL APL
AMANN SHIPPING Amann Shipping Sdn Bhd	Hapag-Lloyd Hapag Lloyd	OOCL Orient Overseas Container Line	ACL ACL Cargo	CMA CGM CMA CGM Group	Harbour Link Line Sdn Bhd
NYK LINE NYK Line	K LINE K Line	MOL 商船三井 Mitsui OSK Line	MSC Mediterranean Shipping Company		

# OVERALL APPROACH : SECTORAL IN NATURE

Guided by the Economic Blueprint, the Ministry of Finance and Economy, in collaboration with relevant ministries and government agencies, has drawn up Industry Roadmaps that outline the short, medium, and long-term plans to develop Brunei Darussalam's **five** priority sectors.



**Downstream Oil  
and Gas**



**Food**



**Tourism**



**Services  
(Aviation and  
Maritime)**



**ICT**



01



02



03




04

## Downstream Oil and Gas

## Food

## Tourism

## Industry Enabler: Strengthening connectivity across all industries

Establishment of  as a  
Chemical Hub

Establishment of  as a  
Production Hub

Increased product offering  
within Conservation Tourism  
& Wellness

- Services: Expand accessibility to increase import & export activities
- ICT: Facilitate readiness of ICT environment



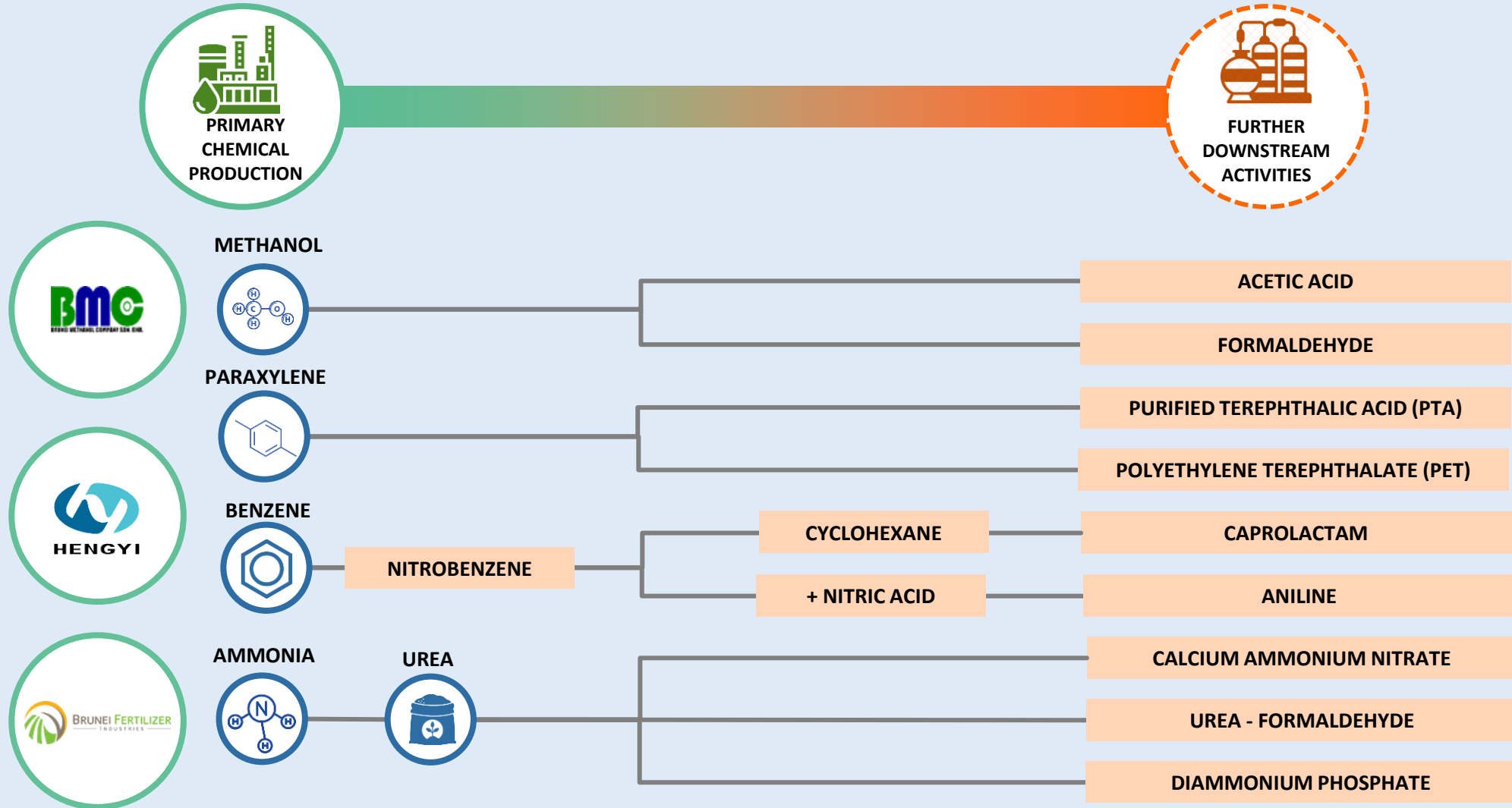
## Downstream Oil and Gas



## Establishment of as a Chemical Hub

- Increase variety of products available in Brunei Darussalam.
- Ensure access to these products for further Downstream purposes.

# FURTHER DOWNSTREAM: OPPORTUNITIES



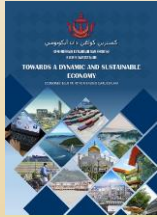
**LEGEND:** — EXISTING INDUSTRIES    — EXISTING PRODUCTS    — POTENTIAL PRODUCT OPPORTUNITIES    - - - POTENTIAL INDUSTRIES



**FOOD**



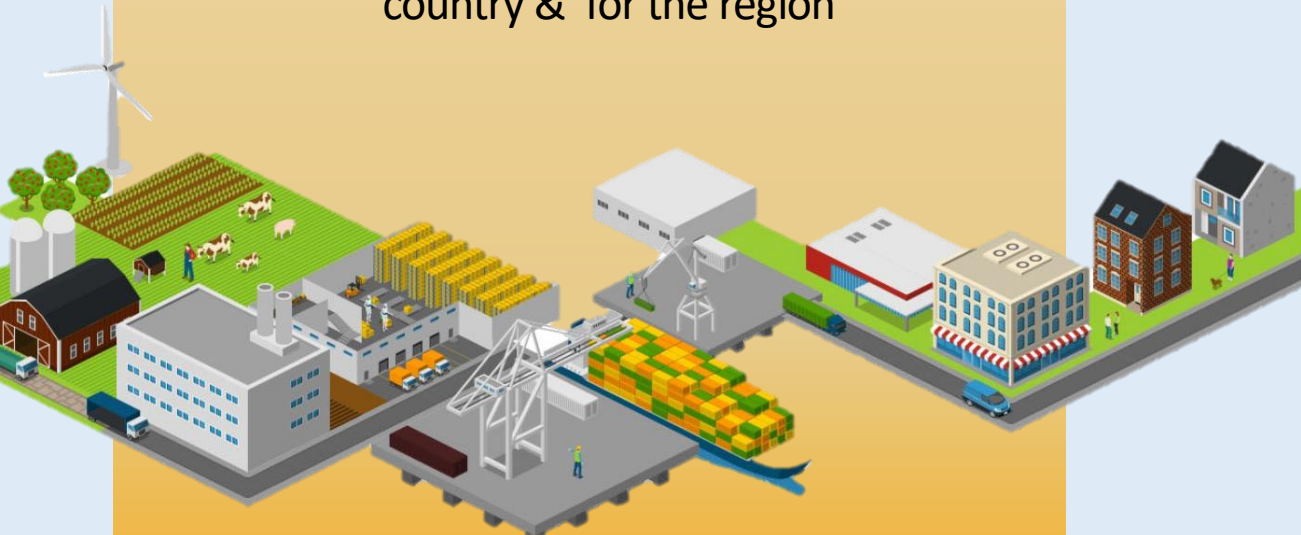
Establishment of  as a Production Hub



Based on the *Economic Blueprint & Food Industry Roadmap* for Brunei Darussalam, one of our objectives is to develop a:

## Food Production Hub

For Brunei Darussalam to become a center of readily available food products in-country & for the region



To Strengthen Food Security & Increase Import Substitution



To Increase The Country's Food Export Volume



To Increase Employment Opportunities



# FOOD INDUSTRY: LOCAL LANDSCAPE

## SEAFOOD



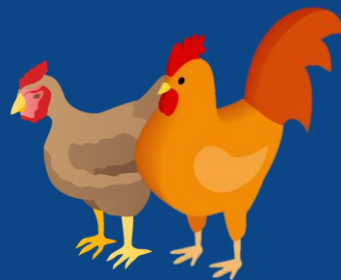
### Key available species:

1. Seabass
2. Barramundi
3. Grouper
4. Hybrid Grouper
5. Pompano
6. Vannamei Shrimp
7. Blue Shrimp
8. Tiger Prawn
9. Tuna - Yellow Fin, Skipjack, Bigeye
10. Mackerel
11. Sardine
12. Atlantic Salmon (Upcoming)

MANUFACTURING & PROCESSING

**PRIMARY**

## POULTRY



### Key available species:

1. Cobb
2. Isa Brown

MANUFACTURING & PROCESSING

**PRIMARY & VALUE-ADDED**



## MEAT

### Key available species: Goat



MANUFACTURING & PROCESSING

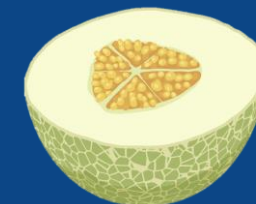
**PRIMARY & VALUE-ADDED**



## CROP

### Key available species:

1. Moringa
2. Dill
3. Oregano
4. Passion Fruit
5. Chilli
6. Musk Melon
7. Cavendish Banana
8. Durian – Musang King, Kuning



MANUFACTURING & PROCESSING

**PRIMARY**



## DISTRIBUTION

### Basic Cold Chain Facilities

### Shipping via Reefer containers or Air Cargo

### ACCESSED MARKET

EU, UAE, Australia, ASEAN, HK, Japan, China, US, Canada

### ACCESSED MARKET

Singapore (table eggs, upcoming: poultry meat)



### ACCESSED MARKET

Sabah and Sarawak (corned beef)  
Singapore (upcoming: fresh beef)

### ACCESSED MARKET

Singapore, Japan, China, Malaysia

# FOOD INDUSTRY: POTENTIAL INVESTMENT OPPORTUNITIES

## LOCALIZATION OF BREEDING STOCK



### Seafood Broodstock:

- Existing species such as Udang Galah, Blue Shrimp, etc. through R&D
- Captive breeding



### Poultry Parent Stock (PS) or Grand Parent Stock (GPS):

- Broiler
- Layer



### Crop Seed:

- Diversified Import Source
- Local production



### Feed:

- Diversified import Source
- Local Production

## SPECIES DIVERSIFICATION



### Seafood:

- Canned Seafood
- Ready-to-eat snacks



### Poultry:

- Canned
- Ready-to-eat meals
- Smoked



### Crop:

- Juice Production
- Concentrate Production (Distillation)



### Seafood:

- Oyster
- Lobster
- Sea Cucumber



### Poultry:

- Ayam Kampong
- French Poulet
- Commercial Varieties



### Crop:

- Dragon Fruit
- Smooth skinned Avocado (Choquette)
- Vanilla

## VALUE-ADDED PROCESSING FACILITY

## DISTRIBUTION NETWORK

Capitalize on BIMP-EAGA routes

Strengthen land access/routes within Borneo

Implement High Standard Cold Chain Facility

Increase availability of Reefer Containers

Improve the availability and costs for Air Cargo Logistics



## TOURISM



### Increased product offering within Conservation Tourism & Wellness

- Leverage on existing assets & facilitate to promote Eco-Tourism activities
- Further develop Conservation effort through collaboration





Leverage on existing assets & facilities to promote Eco-Tourism activities



Further develop Conservation effort through collaboration





Leverage on existing assets & facilities to promote Eco-Tourism activities



Further develop conservation effort through collaboration

## SME OPPORTUNITIES / BENEFITS



CONTRACTORS



TOUR OPERATOR/  
TRAVEL AGENT



FOOD &  
BEVERAGES



TRANSFER OF SKILLS /  
KNOWLEDGE/  
TECHNOLOGY



ARCHITECTS



QUANTITY  
SURVEYOR



ADVENTURE  
ACTIVITIES  
OPERATOR



SUPPLY OF RAW  
MATERIAL/LOCAL  
PRODUCT



JOB OPPORTUNITIES  
IN HOSPITALITY

## ECO-TOURISM ACTIVITIES



ACCOMODATION  
(Eco-resort, Glamping)



ADVENTURE ACTIVITIES



CONSERVATION



WELLNESS



## SERVICES



## INDUSTRY ENABLER

- Expanding accessibility to increase import & export activities

# SERVICE INDUSTRY : POTENTIAL OPPORTUNITIES

**PROMOTE**

**TRADE**  
Increase trade activities & transform Brunei Darussalam as a major maritime and aviation trading, services, and logistics hub

---

**CONNECTIVITY**  
Increase logistics network, volume & efficient handling capabilities

---

**MANUFACTURING & VALUE ADDED**  
Utilizing international standard local facilities

*Note: Not limited to the above*

## Aviation Services

- Airline Connectivity
- Training Centre
- Cold Chain Logistics
- High – Value Cargo Transshipment
- Increase Aviation MRO Services



## Chemical Hub Supporting Services

- Storage
- Waste Management
- ISO Tanks provider
- Independent Lab Testing



## Transshipment Hub

- Trader/Aggregator/Distributor
- Bonded Warehousing
- Specialized Storage facilities
- Processing & Packaging Facility
- Independent Lab Testing



## Maritime Services

- Brunei Bay Southern Anchorage
- Marine Maintenance Yard & Decommissioning Yard
- New Shipping Line

■ Available  
■ Upcoming  
■ Potential Opportunity



# SERVICES INDUSTRY: AVAILABLE & UPCOMING MARITIME SERVICES



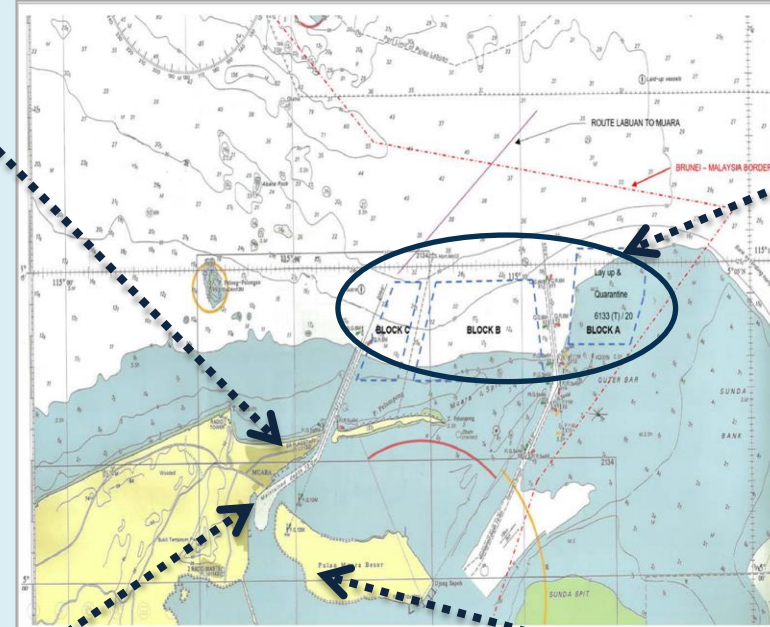
**MUARA PORT**




**MUARA INTERNATIONAL FISH LANDING**

FISHING PORT  
TARGET OPERATION: 2024

- Wharf loading & unloading
- Sorting & weighing
- Supply of water, electricity fuel & ice
- Cold Storage Management
- Transportation
- Processing (primary)
- Packaging

**BRUNEI BAY SOUTHERN ANCHORAGE**

SHORT & LONG TERM ANCHORAGE  
TARGET IMPLEMENTATION: 2024

- Preparation of lay up before vessels arrive
- Security, Safety & Fire Watch
- Drone Patrol & Aerial Report
- Bunkering delivery services, etc




**INTERGRADED MARINE MAINTENANCE & DECOMMISSIONING YARD**

MAINTENANCE REPAIR & OVERHAUL  
TARGET OPERATION: 2024

- Quayside maintenance
- Dry essential docking
- Basic maintenance period
- Class surveys
- Inspections, testing & commissioning
- Emergency docking



**SUPPORTING SERVICES**

- Pilotage Services
- Bunkering Services
- Tank Cleaning
- Pest Control
- Accommodation
- Waste Disposal
- Calibration Services
- Life Saving appliances services
- Medical services



## ICT

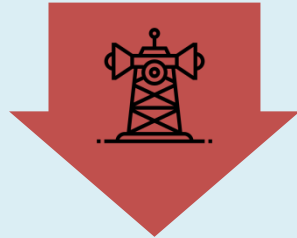


## INDUSTRY ENABLER

- Facilitate readiness of ICT environment

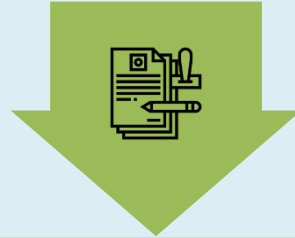
# ICT INDUSTRY: LOCAL LANDSCAPE

## INFRASTRUCTURE



- Network Connectivity
- Government Data Centre
- Government Private Cloud
- Commercial Data Centre (Co-Location)
- Commercial Data Centre (Cloud)
- 5G
- Digital ID
- Digital Payment Platform

## DIGITAL POLICIES & REGULATION



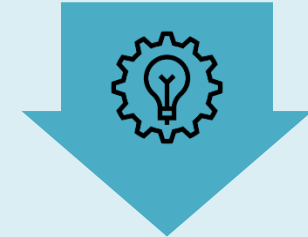
- Electronic Transaction
- Telecommunications
- Intellectual Property
- Broadcasting and Internet Code of Practice
- Computer Misuse
- Official Secrets
- Digital Economy Masterplan
- Fintech Guidelines
- Cyber Security
- Personal Data Protection

## DIGITAL SECURITY



- Cyber Security Brunei

## R&D AND MANPOWER DEVELOPMENT

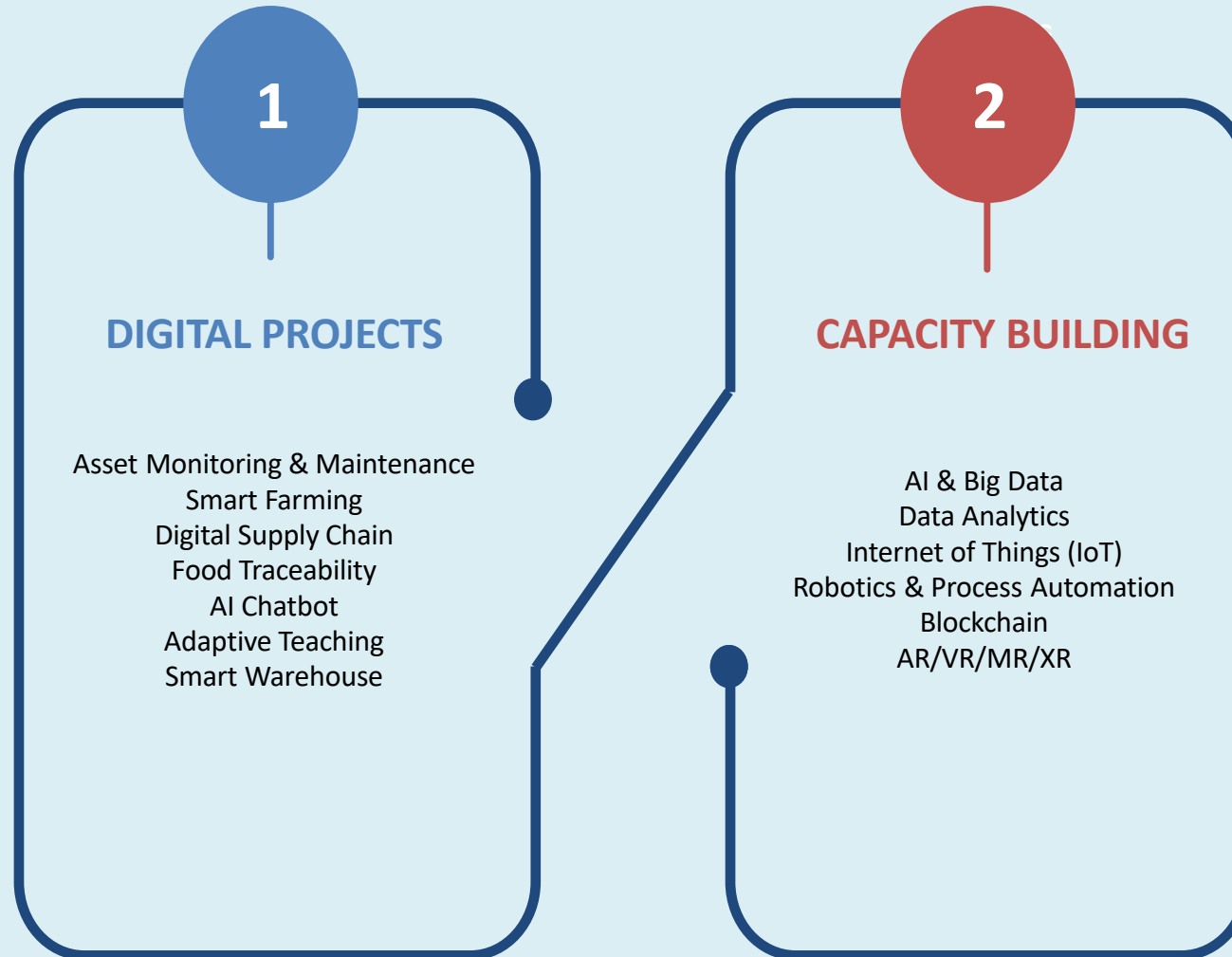


- University Research Centres
- Institutes of Higher Learning
- Specialised Research Centres

Legend:  
 • Existing  
 • Not Available  
 \*\* No Standalone Configuration (High Speed)

## ENABLER for Digitalization in Other Sectors

Focusing in Emerging Technologies for Oil & Gas, Food, Services, Tourism & Healthcare







Market  
Entry  
Support



Support  
Manpower  
Recruitment  
& Permits



Company  
Registration  
Support



Data Resource  
for Businesses



Source for  
Working Space  
& Premises



Support for  
Application  
of Permits  
& Licenses



Facilitate  
Project Financing  
& Co-Investment



Coordination with  
3<sup>rd</sup> Party  
Service Providers



Familiarization  
Visit



Stakeholder  
Coordination

The **Investor's Concierge** is a suite of services offered by the FDI Action and Support Centre (FAST) to support international companies at the critical, early stage of their business journey into Brunei Darussalam.

Supported by our network of stakeholders and partners, resources and knowledge, the program ensures international companies and investors have the best possible experience in exploring and navigating Brunei Darussalam's business ecosystem.

