

BUSINESS OPPORTUNITIES IN AGRICULTURE AND AGRIFOOD SECTORS



DEPARTMENT OF AGRICULTURE AND AGRIFOOD
MINISTRY OF PRIMARY RESOURCES AND TOURISM
BRUNEI DARUSSALAM

INTRODUCTION

- Agriculture and Agrifood industries are the major primary resources and processing sectors which can contribute to the growth of the Gross Domestic Product (GDP), exports and Economic Diversification.
- Through our strategic plan, the agricultural industry output is expected to increase exponentially. The main contributors are produced by livestock and crop sectors. Agrifood processing sector will also increase through the expansion of the livestock and crop sector.
- To further develop the agricultural sector, particularly livestock and crops industry, the Department of Agriculture and Agrifood has taken a lot of efforts by encouraging the participation of local and foreign direct investment (FDI) and increasing the domestic and export market access.

VISION & MISSION

DEPARTMENT OF AGRICULTURE AND AGRIFOOD

VISION

Towards Increasing Production on Agriculture and Agrifood Based Industries through Increasing Productivity And High Technology Oriented For Domestic and Export Market

MISSION

To Stimulate The Growth of Agriculture and Agrifood-Based Industry through High-Technology and Export, Encouraging Progressive Involvement of Local and Foreign Direct Investment, while focusing on High-Yield Production including the Primary and Processing Industries

STRATEGIC OBJECTIVES



To enhance the growth of agriculture and agrifood output continuously every year so as to contribute to the GDP growth, export growth and could lead to economic diversification;



To increase productivity of agriculture and agrifood sectors continuously through the use of technology, modern techniques and encouraging the active participation of local and foreign direct investors (FDI);

STRATEGIC OBJECTIVE (CONTINUED)



To reduce the dependence on imports of agricultural based products, allow the imports of raw materials for the purpose of generating the agrifood processing industry growth;



To reduce dependency on government expenditure in the implementation of strategies and programs while increasing output growth in agriculture and agri-food industry by other methodologies such as Public Private Partnership (PPP), joint ventures and others;

STRATEGIC OBJECTIVE (CONTINUED)



To create the investment opportunities and local businesses in the agriculture and agri-food sectors which will ultimately contribute to the creation of local employment;



To implement preventive measures and control in order to protect the agriculture and agrifood industries from plant diseases, pests and animal diseases that are infectious to humans (zoonotic diseases) for the sustainability of industries concerned;

STRATEGIC OBJECTIVE (CONTINUED)



To ensure quality assurance and safety of the food industry based on agriculture for the welfare of the people, such as the introduction of Brunei Good Agricultural Practice (Brunei GAP) and Logo Perkhidmatan Veterinar (LPV).

CURRENT STATUS

AGRICULTURE AND AGRIFOOD IN BRIEF 2018

Developed Agricultural Land

Livestock: 3,135.74 ha

Crops: 4,529.37 ha

TOTAL : 7,665.11 ha

Agriculture/Agrifood Farmers & Entrepreneurs

Livestock: 832 Entrepreneurs

Crops: 4,322 Entrepreneurs

Agrifood : 385 Entrepreneurs

TOTAL : 5,539 Entrepreneurs

Gross Output of Agricultural Production

Livestock: \$244.63 million

Crops: \$63.71 million

Agrifood Processing: \$127.98 million

TOTAL: \$436.32 million

Agricultural Labour Force

Livestock: 2,160 Persons

Crops: 2,086 Persons

Agrifood: 4,047 Persons

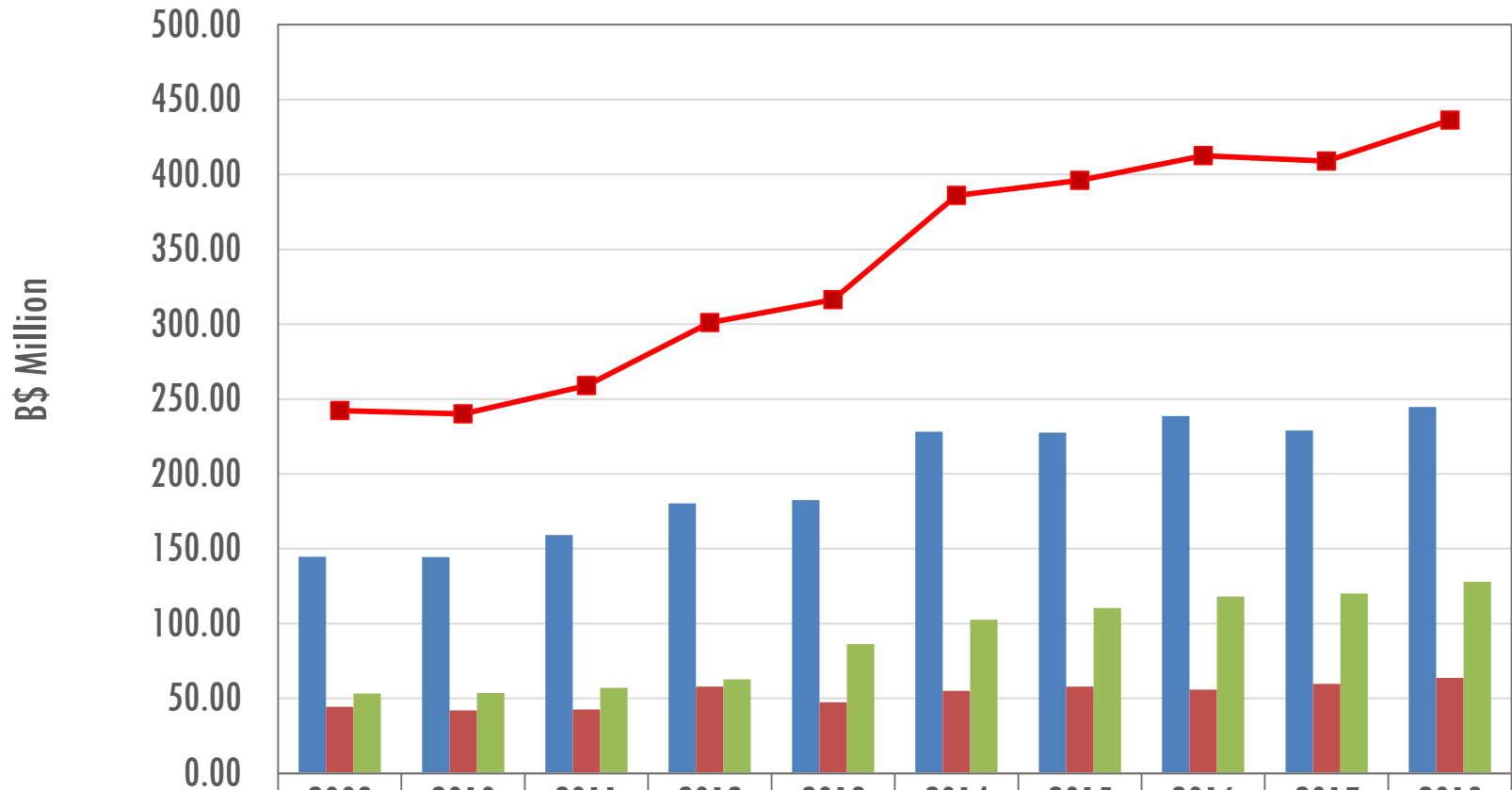
TOTAL: 8,293 Persons

Brunei Population : 421,300 Persons

Note :

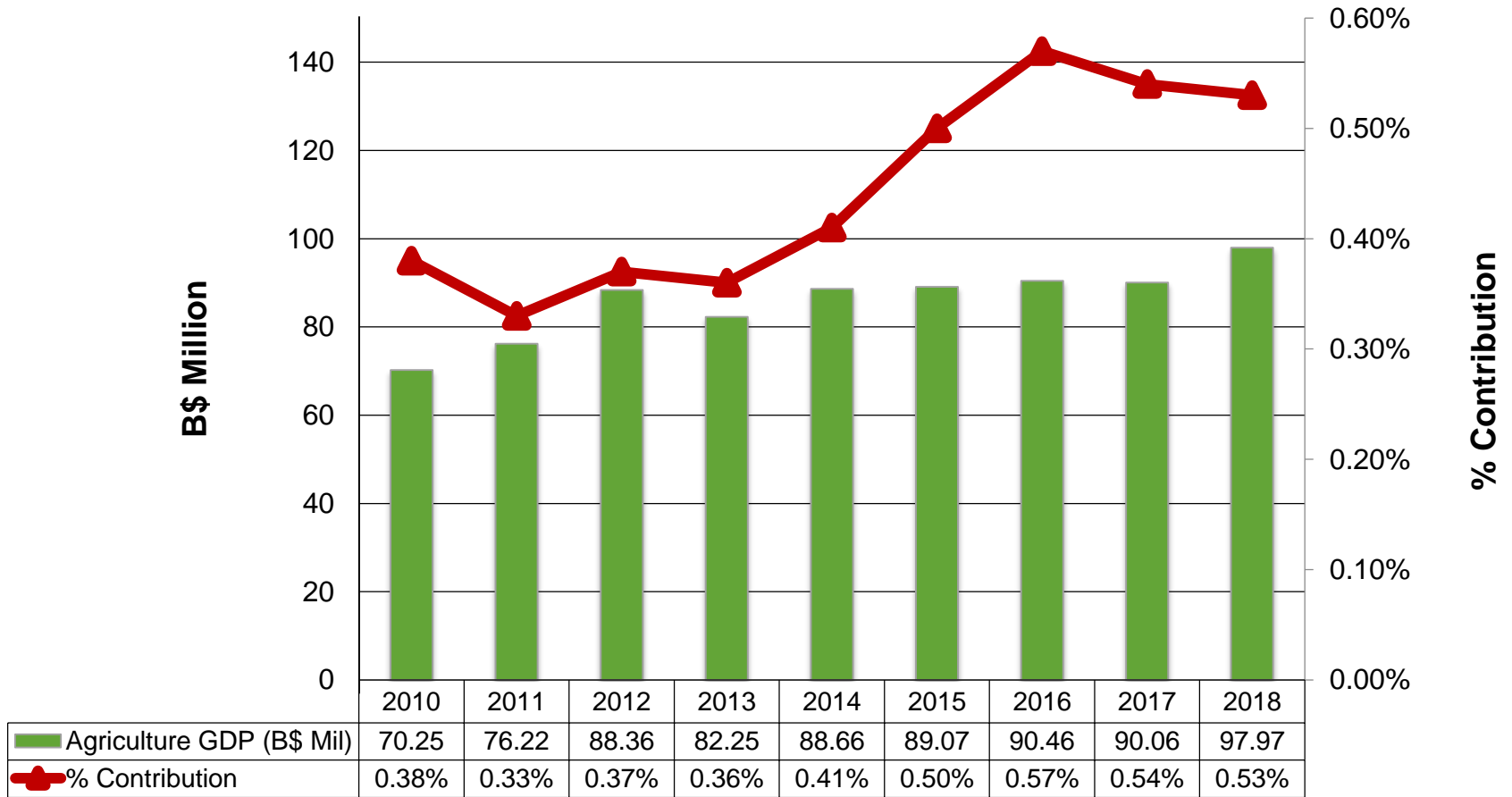
- 1/. Area include Agricultural Development Area (ADA), Existing Area (Ladang Sedia Ada) – EDR & TOL, Young Famer Area and Rural Agricultural Development Area (KPLB).
- 2/. Brunei Population – Report of Population Estimate 2017 (Source : Department of Economic Planning and Development)

AGRICULTURE AND AGRIFOOD INDUSTRY GROSS OUTPUT TREND 2009 - 2018



	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
■ Livestock Industry	144.62	144.39	159.12	180.32	182.52	228.28	227.66	238.59	229.06	244.63
■ Crop Industry	44.48	41.95	42.58	57.85	47.50	55.06	57.84	55.87	59.65	63.71
■ Agrifood Industry	53.20	53.76	57.21	62.83	86.24	102.68	110.48	118.11	120.19	127.98
■ Total	242.30	240.10	258.90	300.99	316.26	386.03	395.98	412.56	408.90	436.32

CONTRIBUTION TO GDP

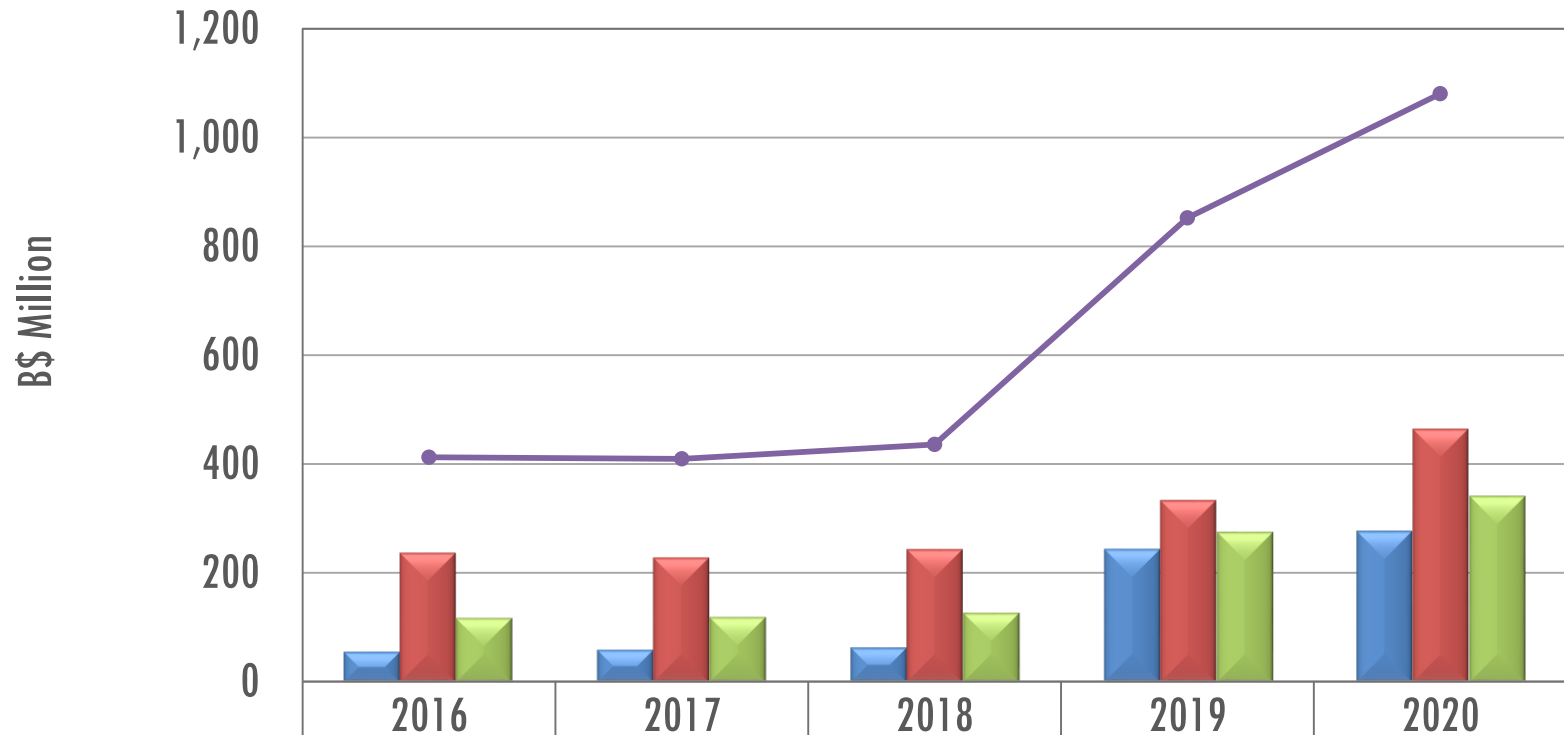


Note:

1. GDP for year 2018 is preliminary estimates and data calculated by using “base year 2010”
2. Source: Department of Economic Planning and Development

TARGET AND TRAJECTORIES

2016 - 2020



Primary Crop	55.87	59.65	63.69	243.17	276.06
Primary Livestock	238.59	229.44	244.63	334.26	464.14
Processed Agrifood	118.11	120.19	127.97	275.31	340.77
Total	412.56	409.28	436.28	852.74	1,080.97

Nota: 2016-2018 are actual data

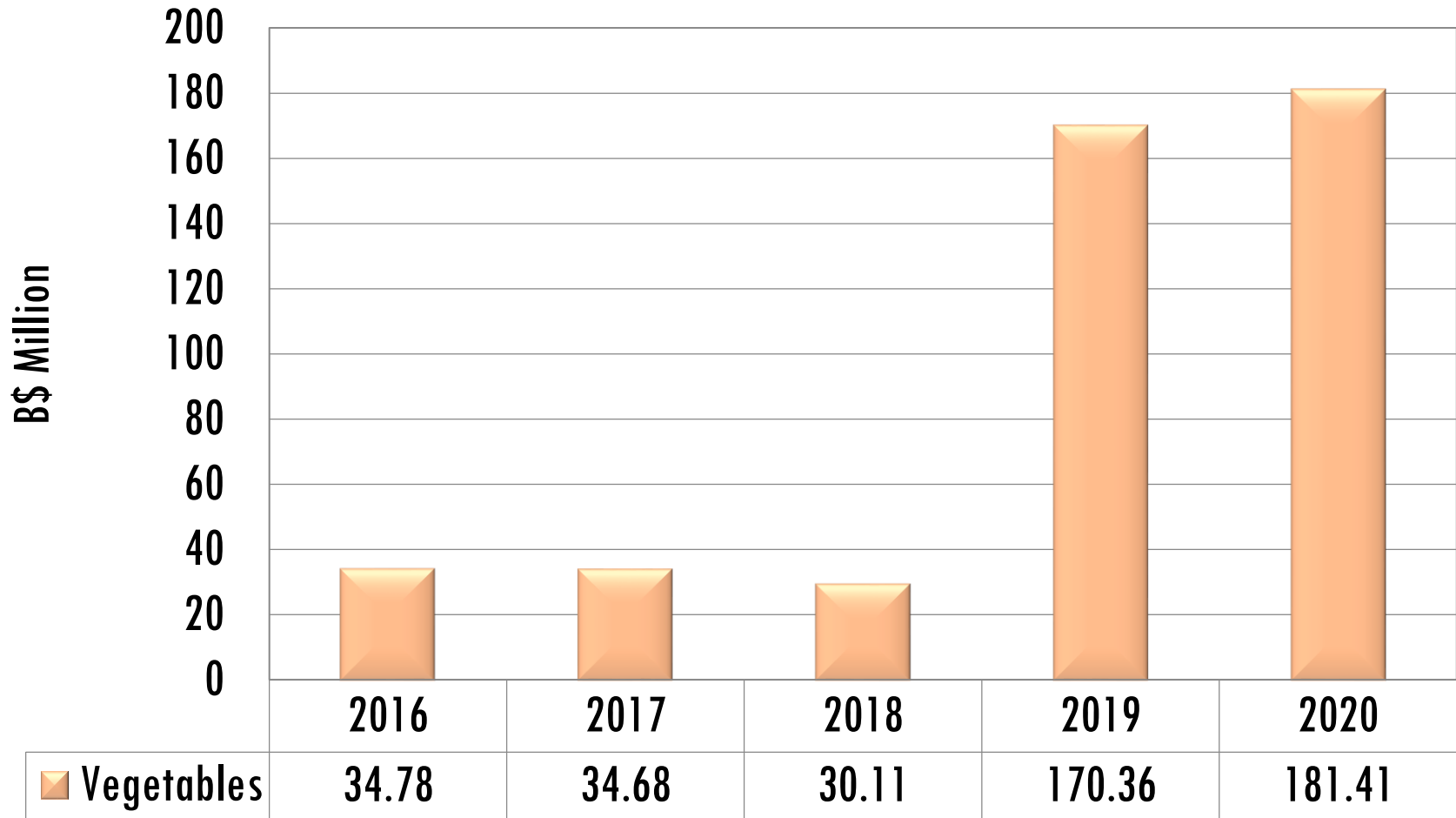
FOCUS INDUSTRIES

STATUS OF VEGETABLES INDUSTRY 2018

- Contributed B\$30.11 million
- Tropical vegetables = 76.1%
- Tropical and Temperate = 45.8%
- Dominated 47% of Crop Industry output
- 7% of Agriculture and Agrifood Sector



VEGETABLES INDUSTRY TARGETS 2016-2020

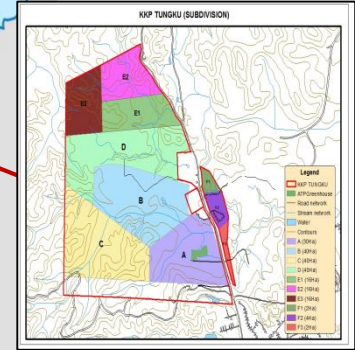


Note : 2016 -2018 actual data

VEGETABLES INDUSTRY AREAS

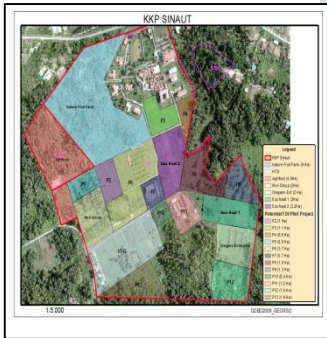
KKP Si Bongkok
Brunei Muara
Area : 54ha

Electricity	Water	Road
/	/	/



KKP Tungku (ATP)
Brunei Muara
Area: 90 ha

Electricity	Water	Road
/	/	/



KKP Sinaut
Tutong
Area: 13 ha

Electricity	Water	Road
/	/	/



Electricity	Water	Road
/	/	/

KKP Lumapas
Brunei Muara
Area : 5 ha

FOCUS TECHNOLOGY



Hydroponics



LED Lighting



Vertical Farming



Fertigation



Greenhouses

Photos sources:

<http://www.powerhousehydroponics.com/4-commercial-vertical-farms-worth-attention/>

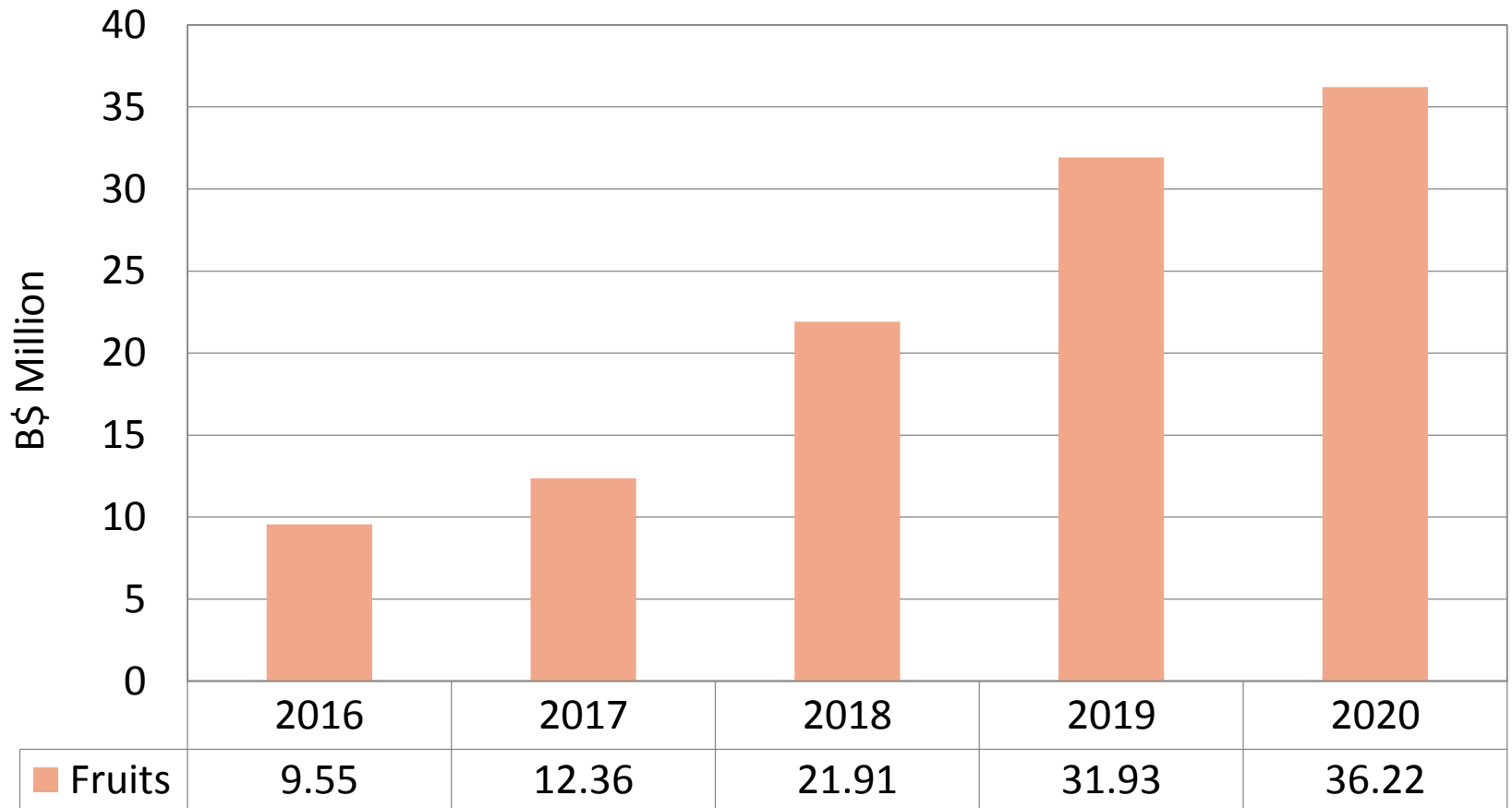
<http://www.eco-business.com/news/panasonic-ventures-into-farming-in-singapore/>

STATUS OF FRUIT INDUSTRY 2018

- Contributed B\$21.91 million
- Tropical fruits = 47.2%
- Tropical and Temperate fruits = 37.3%
- Dominated 34% of Crop Industry output
- 5% of Agriculture and Agrifood Sector



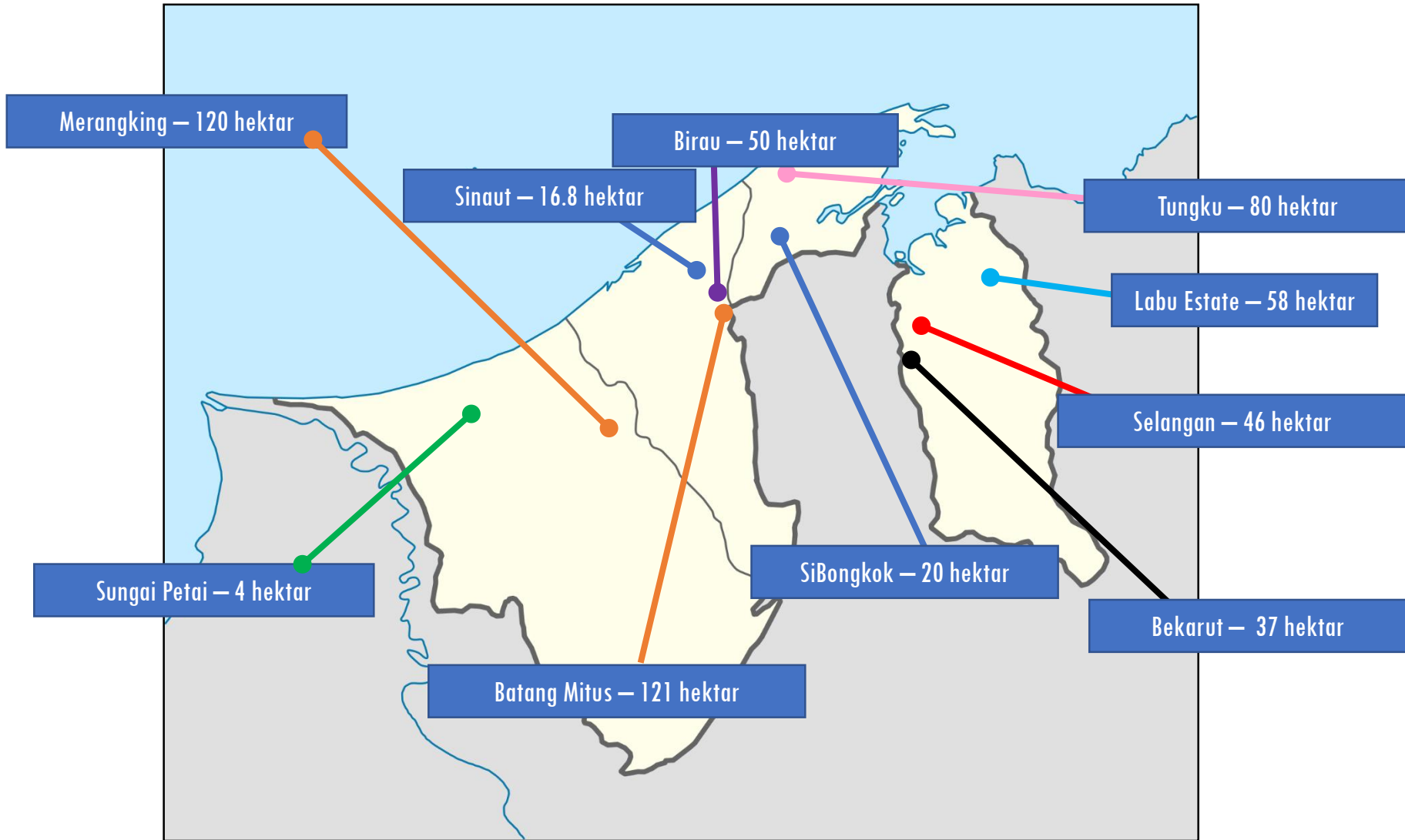
FRUIT INDUSTRY TARGETS 2016-2020



Note :

1. 2016 - 2018 are actual data

FRUIT INDUSTRY AREAS



FOCUS TECHNOLOGY



Drip Irrigation



Fertigation



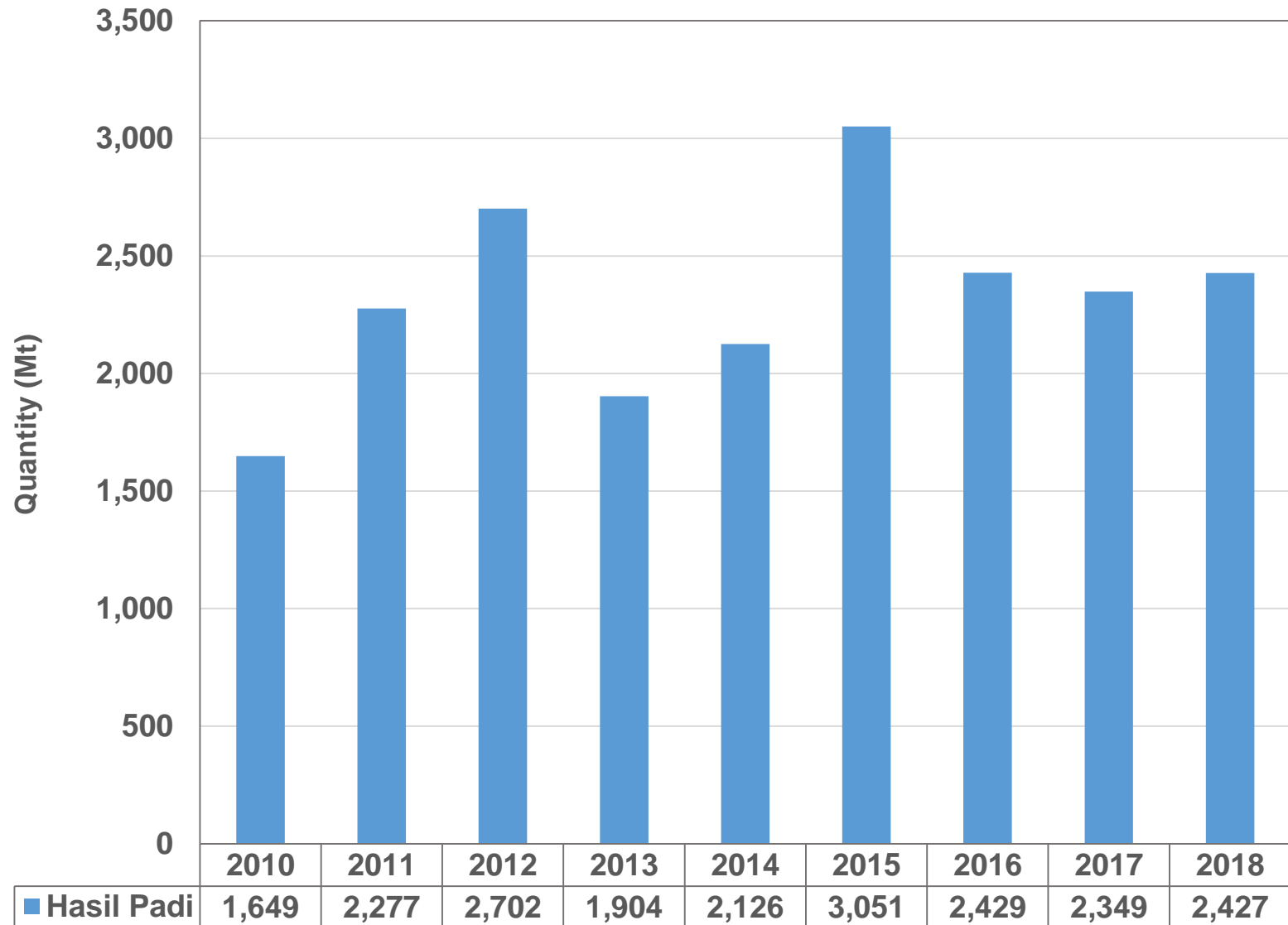
Greenhouses

Photos sources:

<http://www.powerhousehydroponics.com/4-commercial-vertical-farms-worth-attention/>

<http://www.eco-business.com/news/panasonic-ventures-into-farming-in-singapore/>

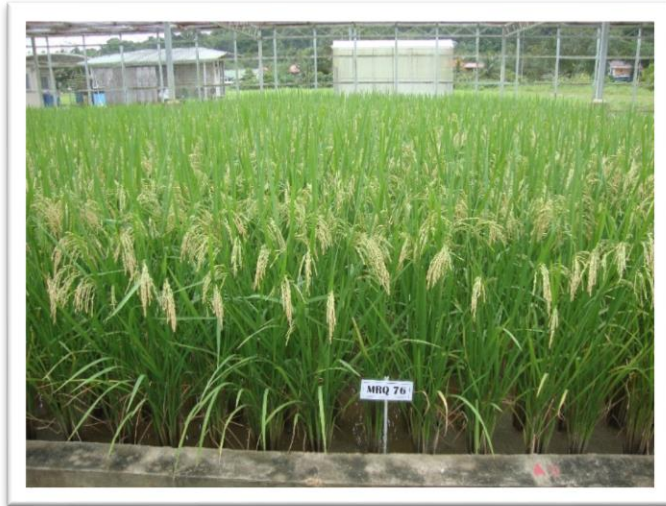
LOCAL PADDY PRODUCTION TREND 2010 - 2018



LOCAL PADDY PRODUCTION BY DISTRICT 2018

DISTRICT	HARVESTED AREA (HA)	NO. OF FARMERS	YEILD (MT)	RICE 65% MILLING RECOVERY (MT)	%
BRUNEI MUARA	777.49	197	2,017.3	1,311.27	83.1
BELAIT	94.56	74	69.6	45.25	2.9
TUTONG	115.60	132	77.8	50.56	3.2
TEMBURONG	173.00	130	262.7	170.78	10.8
TOTAL	1,160.65	533	2,427.48	1,577.86	100.0

PADDY VARIETIES



MRQ76



BDR 5



Laila



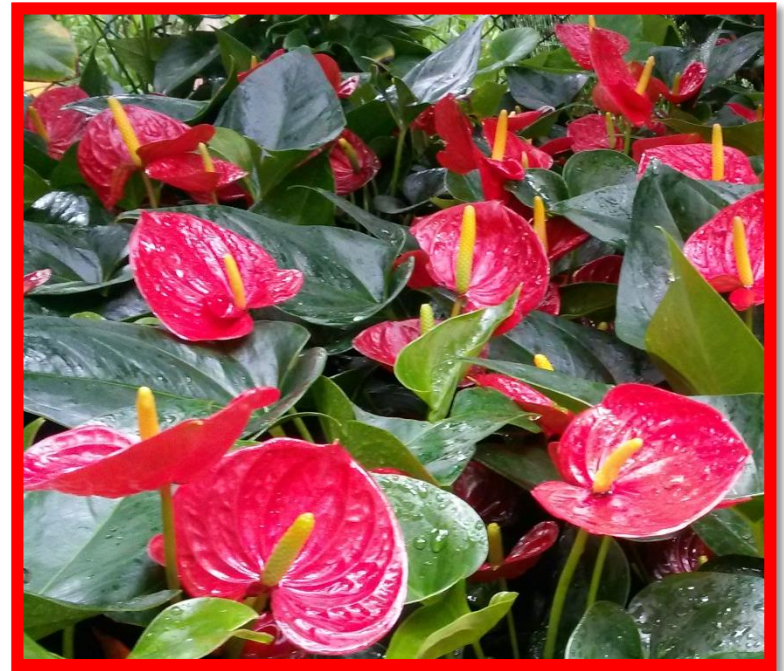
Titih



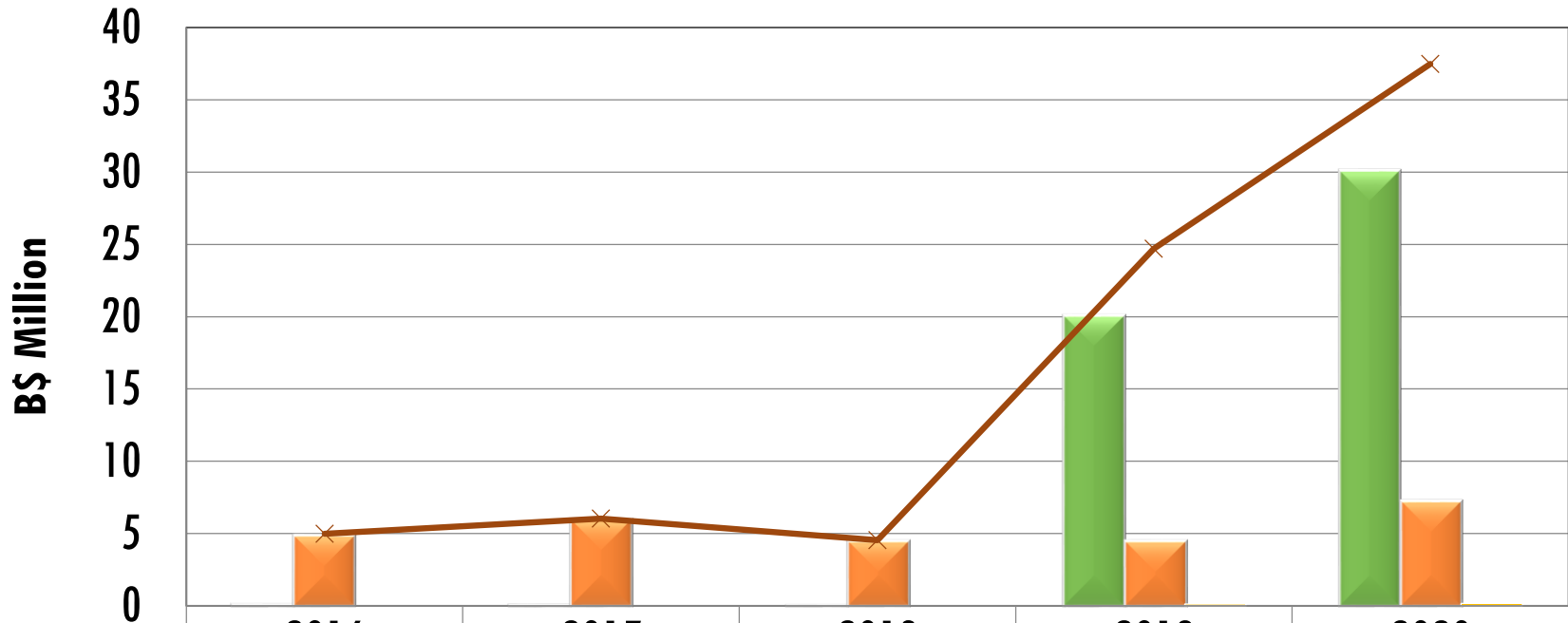
Sembada 188

STATUS OF FLORICULTURE INDUSTRY 2018

- Contributed B\$4.53 million
- Cut Flowers = 7.1%
- Ornamental Plants = 67.9%
- 7% of Crop Industry
- 1% of Agriculture and Agrifood Sector



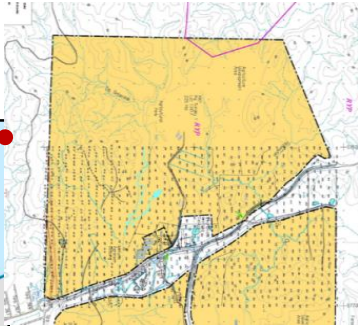
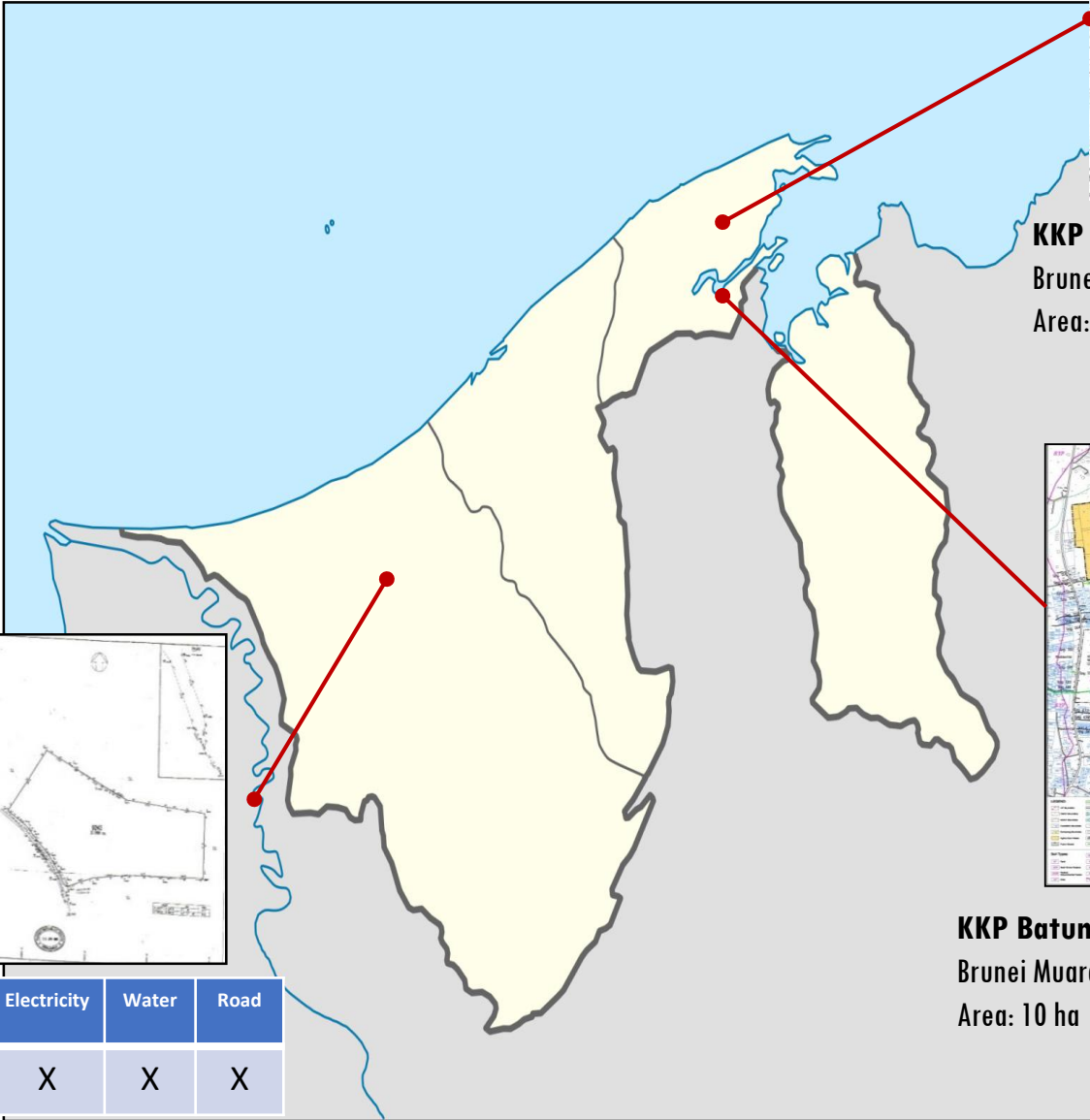
FLORICULTURE INDUSTRY TARGETS 2016-2020



	2016	2017	2018	2019	2020
Cut Flowers	0.12	0.07	0.06	20.10	30.11
Ornamental Plants	4.85	5.95	4.47	4.48	7.21
Loose Flower	0.00	0.00	0.00	0.11	0.16
Total	4.97	6.02	4.53	24.69	37.49

Nota : 2016-2018 actual data

FLORICULTURE INDUSTRY AREAS



KKP Tungku
Brunei Muara
Area: 2 ha

Electricity	Water	Road
/	/	/



KKP Batumpu
Brunei Muara
Area: 10 ha

Electricity	Water	Road
/	/	/



KKP Mumong
Belait
Area: 21ha

Electricity	Water	Road
X	X	X

FOCUS TECHNOLOGY



Blackout Screens



LED Lighting



Benching System



Grading System



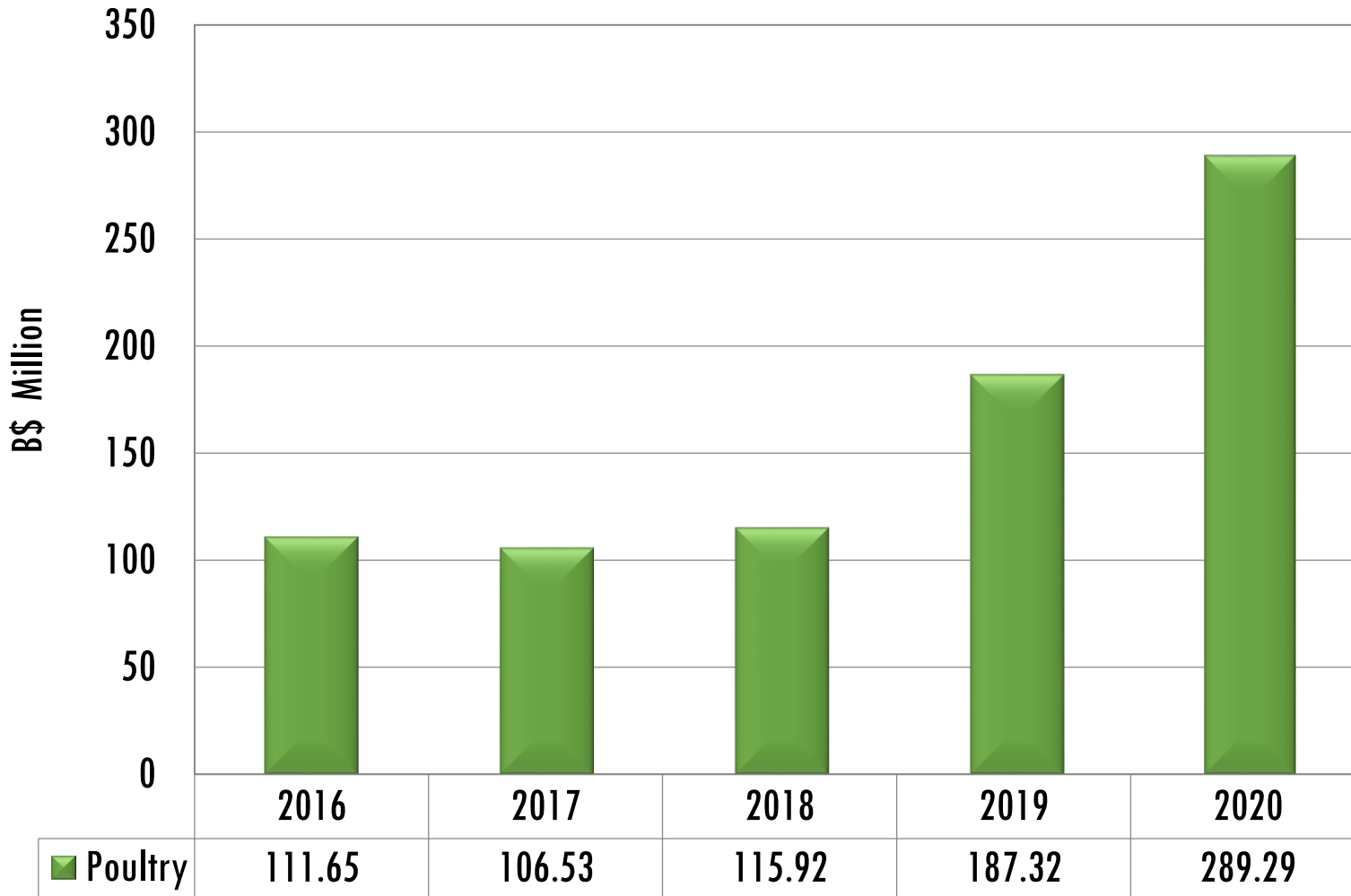
Packaging System

STATUS OF POULTRY INDUSTRY 2018

- Contributed B\$115.92 million
- Dominated 47% of Livestock Industries output
- 27% of Agriculture and Agrifood Sector
- Main Players:
 - 1) Soon Lee Farm
 - 2) Hua Ho Agriculture Farm
 - 3) QAF Farm
 - 4) Ideal Multifeed Farm (IMF)
 - 5) Syarikat Kumpulan Harapan Baru
 - 6) Tunas Harapan Farm



POULTRY INDUSTRY TARGETS 2016-2020



Note : 2016-2018 actual data

POULTRY INDUSTRY AREAS



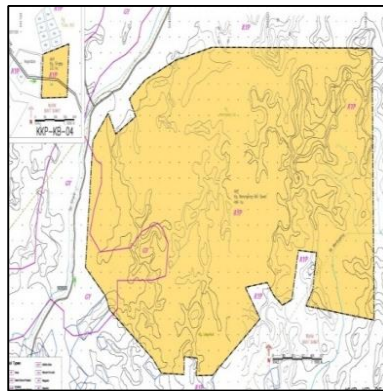
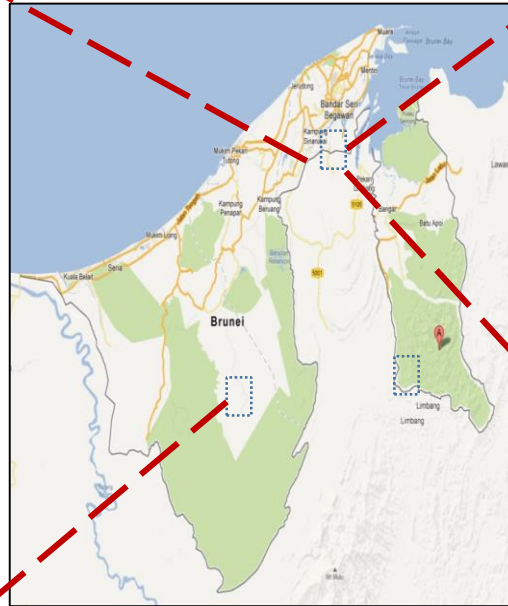
KKP Tanah Tuah
Brunei Muara
Area : 56 ha

Electricity	Water	Road
/	/	/



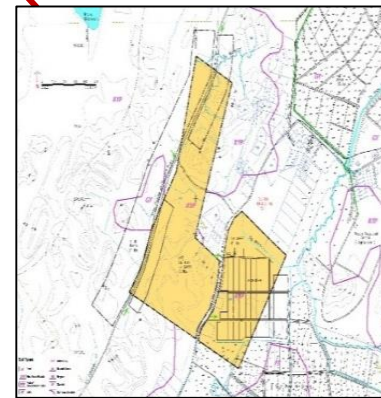
KKP Batumpu
Brunei Muara
Area: 42 ha

Electricity	Water	Road
/	/	/



**KKP Merangking
Belait**
Area: 200 ha

Electricity	Water	Road
X	X	X



KKP Sungai Tajau
Brunei Muara
Area: 4 ha

Electricity	Water	Road
/	/	/

FOCUS TECHNOLOGY



Automated feeding system



Automated water system



Ventilation fans



Efficient ventilation system



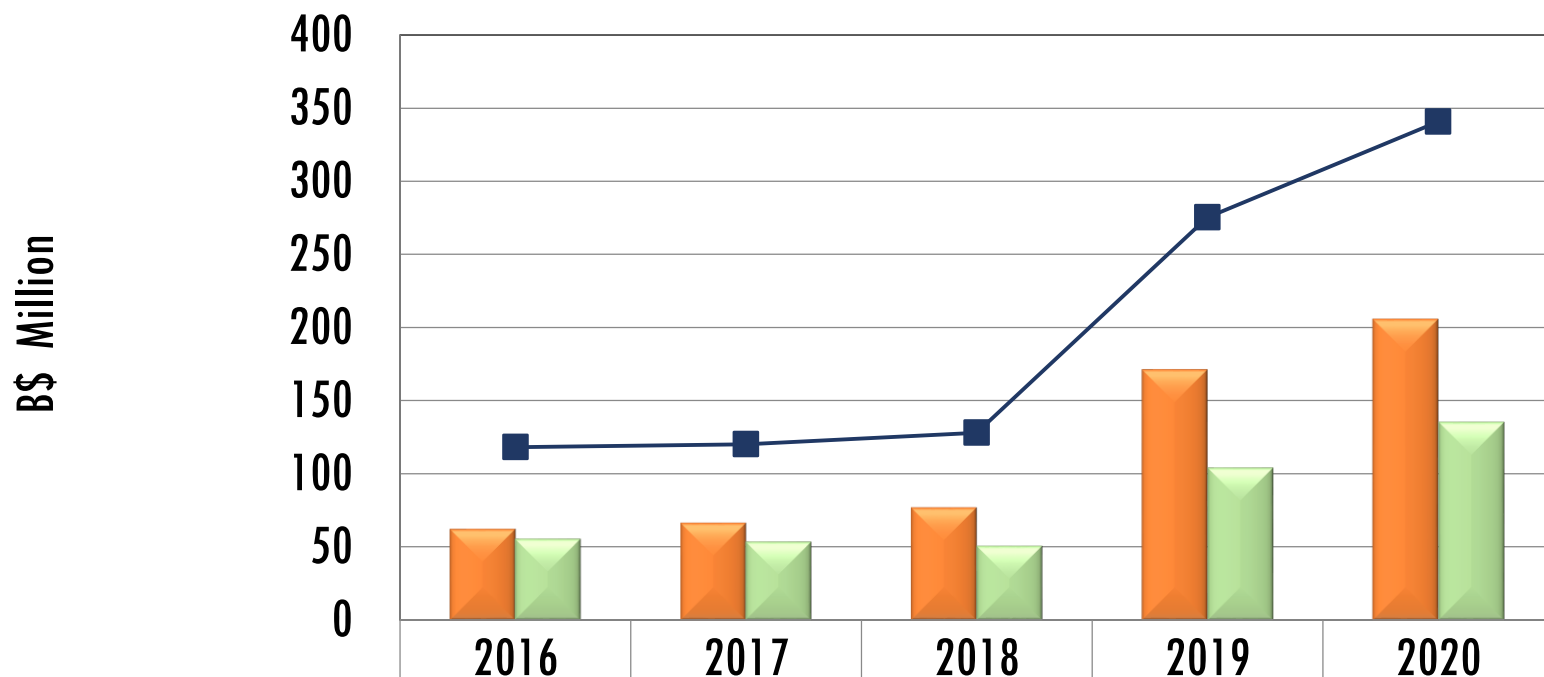
Air-conditioned system with air-conditioned wall

STATUS OF AGRIFOOD INDUSTRY 2018

- Contributed B\$\$127.98 million
- 29% of Agriculture and Agrifood Sector
- Main Players:
 1. BMC Food Industries Sendirian Berhad
 2. PDS Abbatoir Sendirian Berhad
 3. Western Foods and Packaging Sendirian Berhad
 4. Saahtain Asia Sendirian Berhad
 5. Asli-KTM Sendirian Berhad
 6. Sabli Food Industries (B) Sendirian Berhad
 7. Yu Lee Food Industries
 8. Global Mas Prof Foods Sendirian Berhad
 9. IBIC Sendirian Berhad



AGRIFOOD INDUSTRY TARGET AND TRAJECTORIES 2016-2020



Processed based on Livestock	62.63	66.66	77.22	171.40	205.60
Processed based on Crops	55.48	53.53	50.76	103.90	135.10
Total	118.11	120.19	127.98	275.30	340.80

Note : 2016-2018 actual data

INVESTMENT OPPORTUNITIES FOR LIVESTOCK BASED VALUE ADDED PRODUCTS



COLD CUTS



SAUSAGES



CORNED BEEF

INVESTMENT OPPORTUNITIES FOR CROP BASED VALUE ADDED PRODUCTS



SAUCES



FREEZED DRIED



JUICE



SUGAR



SNACKS



DRIED
NOODLES

SPIN OFFS

BUSINESS OPPORTUNITIES AS A SERVICE PROVIDER IN AGRICULTURE SECTOR



SEEDLINGS



FERTILIZERS



MACHINERY



TRANSPORTATION



MARKETING

THANK YOU

<http://www.agriculture.gov.bn>