



ប្រជុំបណ្ណាល័យអភិវឌ្ឍន៍សង្គម

THE CENTER FOR SOCIAL DEVELOPMENT

Address: No. 14D, Street 371, Sangkat Toek Thla, Khan Sen Sok, Phnom Penh, Kingdom of Cambodia.
P.O. Box: 1346, Tel.: 023.656.2333 Email: info@csdcambodia.org Website: www.csdcambodia.org

REPORT

on

A Study Research

Sub-Supporting Study Project on

**Economic Corridors and Industrial Estates, Ports & Harbors,
Metropolitans and Alternative Roads in Cambodia**

Prepared by

Centre for Social Development

Phnom Penh

2010

REPORT

on

A Study Research

Sub-Supporting Study Project on

“Survey on SEZ, Ports, Airports and City Transport in Cambodia”

I. INTRODUCTION.

This study research is made in complementary to a study research conducted by BRC on the topic on ‘A Study on Economic Corridors and Industrial Estates, Ports & Harbors, Metropolitans and Alternative Roads in Cambodia’.

The purpose of this study is to draw a map to support SEZ, ports including river ports and airports, and roads and investigate zoning and new city plans such as bypass, ring road and bridges. After that making clear the bottle necks like traffic jams and access to ports and airports of each city.

As part of our scope of research, this report does not involve any form of analysis of the findings. It is simply the descriptive information that the research team has explored and compile for further analysis.

II. METHODOLOGIES

This is a semi-structured interview that sample, guideline and survey information sheets have been provided by Bangkok Research Center, Japan External Trade Organization (JETRO). Two people from Center for Social Development (CSD) were assigned to implement these research tasks.

1. Process of Survey

In accordance with following attached survey sheets, collect data as well as possible:

- (1) Survey sheet on Industrial Estates/parks, Special Economic Zones and Export Processing Zones
- (2) Survey sheet on Ports and Harbors
- (3) Survey Sheet on Ports along Rivers
- (4) Survey Sheet on Airports
- (5) Survey on City Transport

Fill in the blanks by getting information from the websites of the related organizations and writing materials. Then call on the related organizations in field trips and ask the staff the points which have not been cleared.

1. Survey Objects

(1) Special Economic Zones in Phnom Penh, Soihanoukville, Bavet and Koh Kong

(2) Sihanoukville Port

(3) Port along Mekong River and Tonle Sap River

(4) Airports of Phnom Penh and Sihanoukville

(5) Survey on City Transport of Phnom Penh.

III. Implication/Expected Outcome/Future Development of Study

By drawing a map on SEZ, ports & Harbors and major roads, the bottle necks of the connectivity of Phnom Penh and other cities can be cleared. Policy implication is conducted based on the cleared bottle necks.

IV. Working Process

The study research was going smoothly but was not without limitation. Importantly to note that in Cambodia access to information normally is not disclosed; first, writing materials are not enough and difficult to get them, second, information from website of any organization is not sufficient and mostly not updated. However, the research team has also encountered problems of making of appointment with targeted organization.

V. Conclusion

For the survey on SEZs, the research team has completed the total of 6 interviews with general managers, managing directors of SEZs.

For the survey on other objects the research team has interviewed with policy makers of Sihanoukville Port, Phnom Penh Port, State Secretariat of Civil Aviation, Ministry of Public Works and Transport.

A total of 10 samples of the semi-structured interviews were conducted with the following respondents:

- | | |
|-----------------------------------|------|
| (1) Special Economic Zones | : 06 |
| (2) Sihanoukville Autonomous Port | : 01 |
| (3) Phnom Penh Autonomous Port | : 01 |

- (4) State Secretariat of Civil Aviation : 01
 (5) Ministry of Public Works and Transport :01
TOTAL : 10

MAJOR FINDING:

1 SEZs:

1.1 Zone investors:

- Cambodia : 2
- China : 12
- Taiwan : 11
- Malaysia : 2
- USA : 1
- Ireland : 1
- Vietnam : 1
- Japan : 9
- Korea : 2
- Singapore : 1
- TOTAL : 42**

No	COMPANY	NATIONALITY	INDUSTRY
1	Tiger Wing	Japan	Lady Shoes
2	Cambodia Success Industry	Malaysia	Wire Mesh
3	Evergreen Industrial	Taiwan	Garment (Jeans)
4	Ji-Xiang	Taiwan	Carton Box
5	Cambox	Singapore	Plastic Container
6	Yi Xiang	Taiwan	Hanger
7	Clean Circle	Japan	Lady Shoes
8	Sin Chn Hong Plastic Industry	Taiwan	Shoe
9	Ajinomoto Cambodia	Japan	Food Processing
10	Haru Phnom Penh Comic Center	Japan	Comic reuse, E-comic
11	Dischells Cambodia	Japan	Heat Insulation paint and products
12	Redian Industrial	Korean	Apparel Accessories
13	MKK	Cambodia	Tobacco
14	Sichuan New Hope Agrobusiness Cambodia	China	Animal feed
15	Yamaha Motor Cambodia	Japan	Motor Bike Assembly
16	Liwayway Cambodia Food Industry	Philippines	Snack Food
17	Thibidi Cambodia	Vietnam	Transformator
18	Atlas Ice	Malaysia	Ice
19	Proceeding Cambodia	Japan (Hongkong)	Garment (Kimono)
20	FST PP	Japan	Garment (Kimono)
21	S-Y-G Steel	Taiwan	Bold-nut
22	King Maker	Taiwan	Shoe
23	Forest Packing Co,Ltd	China	Packaging
24	Sheico (Cambodia)	Taiwan	Garment
25	Best Way	Taiwan	Bicycles

26	Ampac Packaging (Cambodia) Ltd	USA	Packaging
27	Eastern Industrial Industry Enterprise Inc.	Taiwan	Textile
28	Lee Grow Plastic Packaging Co.Ltd	China	Packaging
29	Atlantic	Taiwan	Bicycle
30	La More	Taiwan	Footwear
31	DK Inc	Japan	Garment
32	NangGuo Garment Co., Ltd	China	Garment
33	Hong Dou International Garment	China	Garment
34	Qianlima Vehicle Co., Ltd	China	Motor Bicycle Assembly
35	Taihua Plastic Product Co, Ltd	China	Plastic product
36	Huang Jia Arts and Crafts Co,Ltd	China	Candle
37	Wealth (Cambodia) Steel Industry Engineering Co,Ltd	China	Steel processing
38	Horseware Product Cambodia Co.,Ltd	Ireland	Horse ware equipment
39	Zhong Zheng (Cambodia) Co.,Ltd	China	Plastic Bag
40	Keptop Sporting Goods (Cambodia) Co.,Ltd	China	Sporting goods & Leisure articles
41	Brilliant Shoes Group	China	Shoes
42	Camko Moter Group Ltd	Korea	Car Assembly

1.2. Exporting Ports:

- Sihanoukville Port 4/6
 - Phnom Penh Port 2/6
 - Laem ChaBang Port 1/6
 - Ho Chi Minh Port 2/6
 - Phnom Penh Internl. Airport 3/6
 - Sihanoukville Internl. Airport 2/6
 - Ho Chi Minh Airport 2/6
 - Bangkok Airport 2/6
- Occupancy ratio of industries are less than one third of total area.
 - Land Price of land ownership is varied from \$30/m² to UD\$50/m²
 - Price of land use : varied from \$1.2/m² to \$50/m²
 - Ready built factory : varied from USD0.8/m²/month to US\$2.5/m²/month
 - Electricity price is varied from 0.1265UD\$/kwh to 0.25US\$/kwh
 - Water price is varied from 0.15 to 0.6/m³
 - Markets: Domestic, Phnom Penh (2/6), and International- USA, EU, Japan (4/6)
 - One Stop Services and tax incentive according to laws have been provided in all SEZs.
- The below table is summarized land price and utilities cost of SEZs:

No	SEZ Name	Land Price (US\$)	Utilities Cost (US\$)					Mjor Markets
			Land use	Ready built factory	Electr.	Water	Waste water	
1	PPSEZ	50/m2	50/m2 (99 years)	Leasing 5 years 2.5/m2/year	0.19/ kwh	0.30/m3	0.26/m3/month	Dom. Foreign
2	MSEZ			Over2ha: 22-30/m2 Less2ha:22- 30/m2+10%	0.1265/ kwh	0.15/kwh	0.25/m3	USA ,EU
3	Tai Seng SEZ		12,000/year	Leasing for 70-90 years: 1.30/m2	0.1265/ kwh	Free (water pumped)	-	USA,EU Japan
4	SSEZ II		22-27/m2 for 50 years	Opt.1: 0.8/m2/month Opt.2: 2.5/m2/month, the plant can be used for free for 30 years after successive payment for 8 years	0.15/kwh	0.25/m3	-	USA EU
5	SH Port SEZ	55- 65/m2			0.0025- 0.00275/KVA /month			
6	NKKSEZ		30/m2/year	21/m2/year	0.20/kwh	0.42/m3	0.12/m3	Dom.

2. Survey on Ports in Cambodia.

a. Sihanoukville Port (PAS):

- PAS is a sole international deep sea port in Cambodia which has:
- 290m length of general cargo terminal by -8.00m draft
- 290m length of Passenger Terminal by -9.00m draft.
(Both possesses 2 warehouses each of 6,000m²)
- 750m length of container terminal by 10.5-11.5m depth and linked with 64,000 m² and 3 warehouses with the total area of 24,000m²
- 200m length of oil Jetty by -10.5m draft.
- The capacity of PAS in its present condition estimated at about 950,000 tons per year and PAS can accommodate ships of 10,000-15,000 tons deadweight.
- There are five shipping lines namely RCL, MCC, APL, ITL and Cots having entered into contracts with PAS.
- One Stop Service.
- Single Window Service System

- ASYCUDA System
- b. Phnom Penh Autonomous Port (PPAP)
 - PPAP is international river port and domestic port which has facilities:
 - 1- Container Terminal:
 - Quay:20m x 300m (Berthing capacity: 3 barges at one time)
 - 2- Domestic Port:
 - Length 333m (Inter Provinces: PP- Kg. Cham; PP – Siem Reap, & others)
 - 3- Passenger Terminal:
 - 2 Pontoons of 15m x 45m each
 - 4- Island Container Depot (ICD):
 - Area: 92 000m²
 - PPAP, accessible to vessels from the South China Sea through Vietnam
 - Vessels of up to 2,000 dwt – can use the route without difficulty, and 5,000 dwt can pass the entrance to the Mekong on favorable tides (Regular dredging is necessary at three points in Cambodia for the 5,000 dwt vessels to reach Phnom Penh).
 - There are several feeder shipping lines namely SOVEREIGN BASE Logistics Company, Gemadept Company, Hai Minh Company, New Port Cypress and others such as MOL, Hyundai, Hanjin. Maersk Line.
 - One Stop Service.
 - New Container Terminal is constructing with capacity from 120,000-300,000 TEUs, port area of 20ha with berth of 22m x 300 m at about 25km downstream from current location.
 - Take advantage of Vietnam Cai Mep Port development
 - Comparison of alternative routes:
 - * PP-HCM-(HK or SG)-USA to PP-Cai Mep- USA ,(Cost reduce by at least \$200, and at least 2 days shorter lead time)
 - * PP-SHV- (Hub Port PSA)- USA to PP-Cai Mep-USA (Cost reduce by at least \$100, up to 3 days shorter lead time).

Besides Phnom Penh Port, the team has also collected data information of several ports located downstream and upstream of Mekong river until Kampong Cham town those who are under controlling of Phnom Penh Autonomous Port . These ports are as follow:

No	Name of Port	Name of terminal	Number of berth	Total lengths of berths (m)	Distance (km)	Others
1	Asia Flour Mill Corporation and Shore Berth	Asia Flour Mill Terminal	One shore berth	60	107	Bassac river
2	Sokimex Floating Pier (Chak Angre)	Sokimex Chak Angre	one floating berth	20	111	Bassac
3	Dey Eth Terminal and	Dey Eth Plywood Factory	one	40	79	Mekong

	Factory					river
4	Sokimex Floating Pier	Sokimex Russei Keo	one floating	25	110	
5	Savimex Floating Pier	Savimex	One floating	15	115	
6	Kilometer Number 6 Terminal	Kilometer Number 6 Terminal	one	60	112	Tonle Sap
7	Gas Terminal Prek Pneou	Gas Terminal	one floating	20	116	Tonle Sap
8	Bright Victory Terminal Floating Pier	Bright Victory	one floating	25	122.5	Tonle Sap
9	TELA Terminal and Pier	TELA (Prek Pneou)	one	15	122	Tonle Sap
10	Men Sarun	Men Sarun Company	one pier	150	126	Tonle Sap
11	Phea Phimex and Fu Chan Factory	Phea Phimex and Fuchan	one	45	-	Mekong
12	TOTAL Oil Terminal	TOTAL	one floating	35	-	Mekong
13	SAMLING Terminal and Factory	Samling Terminal	Shore berth	200	50	Mekong
14	Petronas Oil Terminal	Petronas	one floating pier	30	55	Mekong
15	Sokimex Port and Terminal (Prek Ksay)	Sokimex Prek Ksay	one floating	20	44	Mekong
16	Neak Loeung Terminal (Koh Cham Roeun)	Shore berth		200	42	Mekong
17	Neak Loeung Kroam Terminal	Neak Loeung Terminal	Shore berth	25	41	Mekong
18	Mekong Bright Victory Oil Company	Mekong Bright Victory	one shore berth	70	126	Mekong
19	Prek Anchanh Shore Berth	Prek Anchanh	Shore berth	200	130	Mekong
20	Thary Import Export Co.Ltd	Oil Tonle Bet Terminal	Under construction	-	209	Mekong
21	Kampong Cham Terminal	Kampong Cham Terminal	Shore berth	250	212	Mekong

4. Survey on Airports:

Phnom Penh International Airport:

- Located around 10km from city center,
- PP airport is improved and upgraded by private developer (SCA) under a long-term BOT concession.
- Airport runway is 3000m x 45m with runway shoulder of 7.5m each side resurfaced by asphalt, and runway strips of 3120m x 300m.
- Airport has passenger terminal for two floors international of 17,300 sq. meters area; and domestic arrival of 1,560 sq. meters,
- Airport also has warehouse of 6,500sq. Meters
- The number of passengers have significantly increased. In 2007, there were 34,538 international flights arrived to and departed from Cambodian airports carrying 2.9million passengers, 41.2 million kg of baggage, 26.0 million kg of cargoes, and 0.6 million Kg of mails.

Sihanoukville International Airport:

- is located around 18 km east of Sihanoukville which has runway strip of 2320m x 300m, passenger terminal of 1600m² and presently has not warehouse yet.
- No regular flight schedule, but charter flight only.

5. Survey on city transport:

- No public transportation by bus and railway yet in Phnom Penh
- Traffic jams at peak hours from 6:30-8:30am and 4:30pm-6:30pm. The major points of traffic jams are : 1) intersection of PET LORK SANG with intersected at 271 road and Russian Blvd and road 598; 2) intersection of Stung Mean Chey which intersected at Preah Monireth Blvd and road 271; and intersection of Monivong Blvd and Russian Blvd from 6:30am-11:30am and from 4:30pm-6:30pm
- Countermeasures to overcome traffic congestion by Phnom Penh municipality are to increase lanes and building flyovers roads. The municipality is planning to build two flyover roads at above first and second intersection in near future to dissolve traffic congestion. Moreover, the 4Km road NR.6A section from Chroy Chanvar bridge (Japanese friendship) upward is widening 11m each side, progress has been made by 20% so far.

Annex: List of contacted Persons and companies

No.	Company/Organization	Date	Contacted Person	Position	Phone	Email
1	Sihanoukville SEZ II	10-Sept-10	Michelle Zhang	Deputy Office Director	855-99518315	migxi.zhang@163.com
2	Neang Kok Koh Kong SEZ	13-Sept-10	Thitidej Tongpatara	Deputy President	(855) 11 838 877 (66) 81760 6266	vp@kohkongresort.com
3	Stung Hav SEZ	13-Sept-10	Eric Tan	Marketing Manager	(855) 16 827 999	erictan@attwoodgroup.com
4	Sihanoukville Port and SEZ	14-Sept-10	Ma Sun Hout	Deputy General Manager	(855) 16 34 52 28	sunhoutma@yahoo.com
5	Phnom Penh Port	15-Sept-10	Hei Bavy	Delegate of Royal Government in charge as Chairman & CEO	(855) 12 812762	hei_bavy@online.com.kh
6	State Secretariat of Civil Aviation	15-Sept-10	Say Sokhan	Under Secretary of State	(855) 12 659 733	
7	Ministry of Public Works & Transport	15-Sept-10	Lim Sidenine	Secretary of State	(855) 12 500 444	limsidenin@yahoo.com
8	Phnom Penh SEZ	16-Sept-10	Hiroshi Uematsu	Managing Director	(855) 16 228 188	h_uematsu@ppsez.com
9	JETRO, Phnom Penh	16-Sept-10	Kiyotaka Doho	Representative	(855) 11 354 708	kiyotaka@jetro.go.jp
10	Council for Development of Cambodia	16-Sept-10	Suon Sophal	Deputy Director of Investment promotion Dept	(855) 90 691168	sophalsuon@yahoo.com
11	Tai Seng Bavet SEZ	17-Sept-10	Ly Hong Sinh	Director	855 23 723 492	taisengimpex@yahoo.com
12	Manhattan SEZ	17-Sept-10	Leon O	Deputy General Manager	855 23 721 000	leono@unet.net.tw