



Mekong 2023 Forum

Driving Transformative Change in the GMS

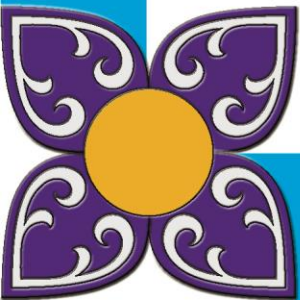
**Reshaping Logistics and Investment through
Emerging Trends and Green Practices**

Kunming City, Yunnan Province, P. R. China

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STOM Leader for Cambodia*

Designed by CHHIENG Pich



Outline

1. Cambodia at-a-Glance
2. Institutional & Governance Framework of Logistics
3. Comprehensive Intermodal Transport and Logistics Master Plan 2023-2033
4. Government Commitment to decarbonization

1. Cambodia at-a-Glance

Cambodia at-a-Glance

- Land area : 181,035 km² and bordering with VN, Laos PDR & Thailand
- Population : 16.72 million (2020) – Average growth of 1.4%
- GDP growth : 7.7% in average in 1995-2019, making Cambodia among the fastest-growing economies in the world
- GDP per capita : US\$1,932 (2023 est.) by MEF
- Ranking of LPI : 115th (2023)
- Road length : 55,242 Kilometer
- Railway length : 652 Kilometer
- Coastal line : 443 Kilometer
- Became a Lower Middle-income Country in Aug 2015 by the World Bank,
- *Planning to become an upper-middle-income by 2030 and a high-income by 2050,*

2. Institutional & Governance Framework for Logistics

Institutional and Governance Framework

National Logistics Council (NLC)

(MPWT, MEF, CDC, MoC, MoP, & SNEC), main role as policy-maker



National Logistics Steering Committee (NLSC)

(Line Ministries, Private Sector & Academia – 36 members plus all 24 provincial governors), main role as policy-implementer & Monitoring



Secretariat

(General Department of Logistics,
MPWT)



Advisory Board

(Development Partner, Private
Sector & Academia)

3. Comprehensive Intermodal Transport and Logistics Master Plan 2023-2033



- ✓ In collaboration with the Supreme National Economic Council (SNEC), MPWT has developed a Comprehensive Intermodal Transport & Logistics Master Plan 2023-2033 (CITL-MP) with the support from various DPs, including China International Engineering Consulting Corporation (CIECC),
- ✓ CITL-MP is a consolidation of master plan of all modes of transport into a comprehensive and inter-connected master plan which consists of Road, Rail, Waterways, Ports, Logistics, Air and Intermodal Transports,
- ✓ CITL-MP has identified 174 both hard and soft infrastructure projects with an estimation of US\$36.6 billion of investment for the next 10 years,
- ✓ CITL-MP is expected to get approval from the government by the end of this year,

Vision and Goals of CIT-MP 2022-2030

Vision: Continue to improve and develop transport and logistics system by focusing on promoting the development of hard and soft infrastructure towards highly interconnected intermodal transport system for both in-country and the region in which it can contribute to promote the national economic growth as well as socio-economic needs and inclusiveness.

Goals

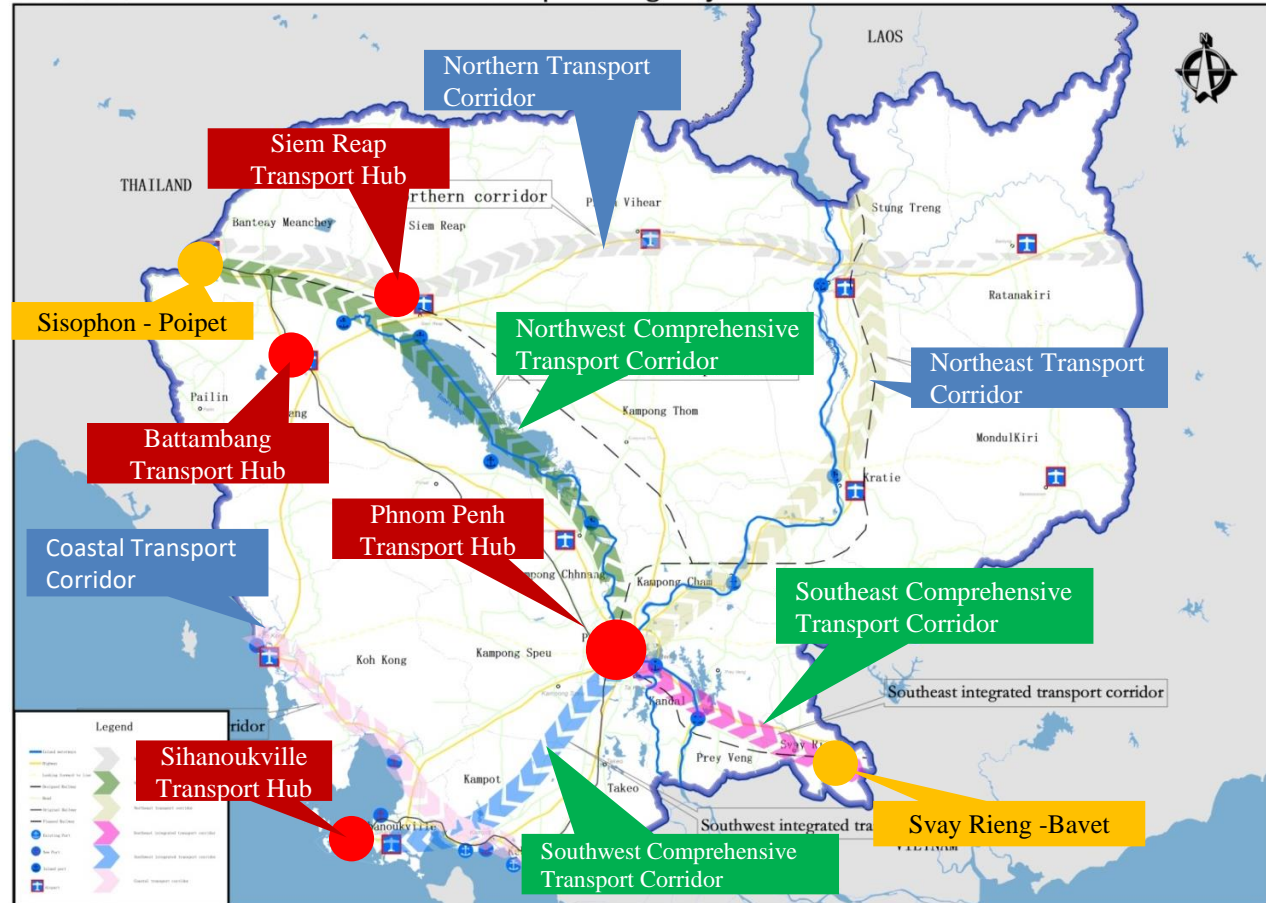


1. Expand the coverage and improve the capacity of transport infrastructure system,
2. Improve the efficiency and effectiveness of transport infrastructure and services,
3. Improve the efficiency of logistics service and logistics cost,
4. Improve and promote transport infrastructure to support national development policies,



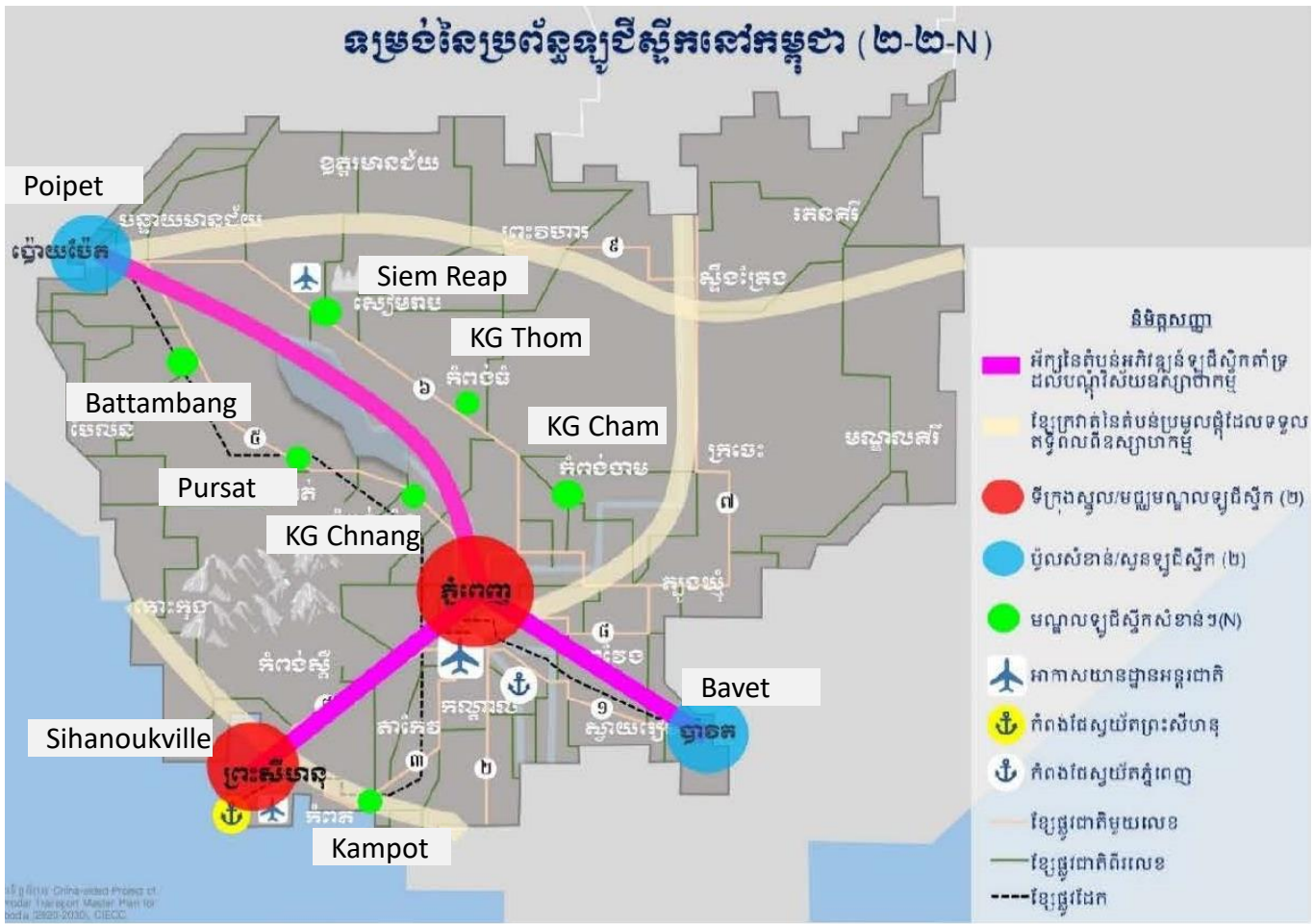
“3-3-4-2” Comprehensive Transportation Network

- **3 Major Transport Corridors:** PNH-SHV, PNH-Poipet & PNH-Bavet,
- **3 Secondary Transport Corridors:** Koh Kong-Prek Chak, PNH-Stung Treng, & O’Yadao-Poipet,
- **4 Major Transport Hubs:** PNH, SHV, Siem Reap (SR), & Battambang,
- **2 External Transport Nodes:** Serey Sophon-Poipet & Svay Rieng-Bavet,



2+2+N Logistics System Network

ទម្រង់នៃប្រព័ន្ធឡូជីស្ទិកនៅកម្ពុជា (២-២-N)



- 2 Cores, 2 Poles and Multiple Centers (N):
- ✓ 2 Cores: PNH and SHV Logistics Complexes,
- ✓ 2 Poles: Poipet and Banteay Meanchey Logistics Complexes,
- ✓ N: Logistics Centers in Siem Reap, KG Thom, KG Cham, Banteay Meanchey, Battambang, Pursat, KG Chnang, & Kampong Speu,

© 2010 China-ASEAN Project of Modern Transport Master Plan for Cambodia (2009-2030), CIECC

Expressway Master Plan



17 Expressways in which 12 are newly constructed with 2,720 km:

- 4 expressways (800km) are planned by 2033 which include PNH-SHV, PNH-Bavet, PNH-SR-Poipet, & Ring Road 3,
- Red colors are expressways being planned by 2050,
- Blue dotted colors are expressways being planned for the future,

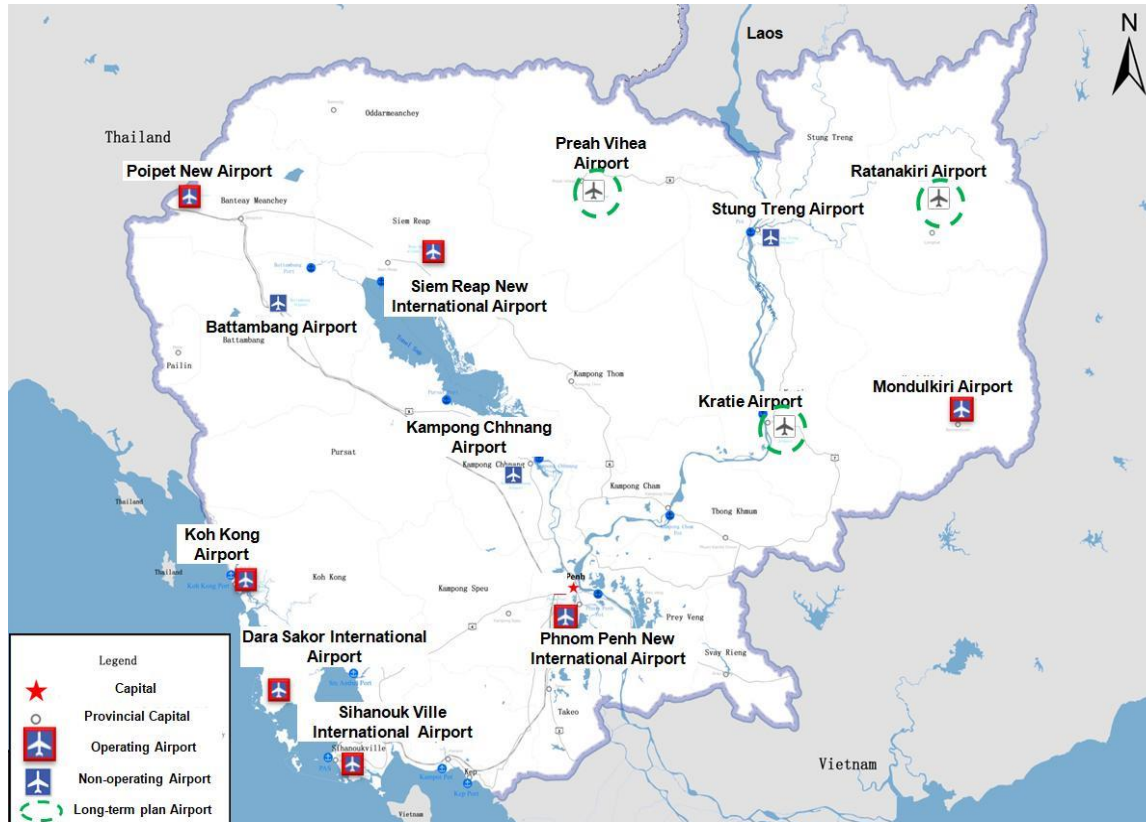
Railway Master Plan



There are two phases:

- By 2027, improve the existing rail lines (PNH-SHV & PNH-Poipet)
- By 2033, high-speed rail link: (i) PNH-SHV, (ii) PNH-Poipet, (iii) PNH-Trapang Kriel (Cambodia-Lao Border), (iv) PNH-Bavet, & (v) PNH-KG Thom-Siem Reap-Poipet,

Air Transport Master Plan



2030 Air Transport Forecast:

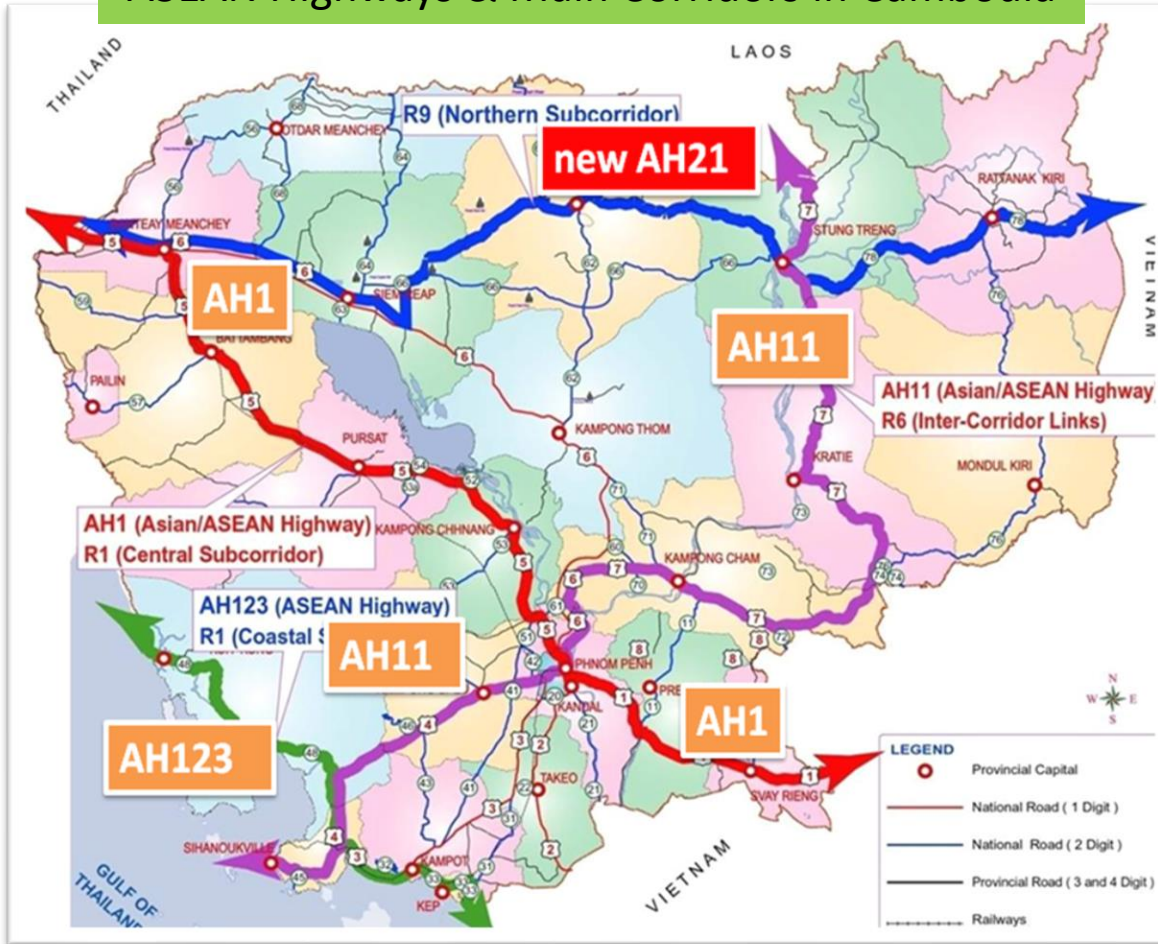
- 26.5 to 30.5 million passengers/year in which 2.9 million passengers are local. This forecast is included new airports,
- 350,000 to 400,000 ton/year in which 180,000 ton are local,

2030 Air Freight by Airport

Airport	Freight in 10,000t
Techo Int' Airport	28 to 31
SR Angkor (new)	3 to 4
Sihanoukville	3 to 4
Koh Kong (new)	-
Dara Sakor	1
Poipet	-
Mondul Kiri	-

Selected Projects that re-enforce regional freight connectivity

ASEAN Highways & Main Corridors in Cambodia



1. *Expressway Phnom Penh (PNH)-Sihanoukville (SHV), officially opened to traffic on 01 Nov 2022. it has definitely changed the face of travelling in Cambodia,*
2. *Expressway PNH-Bavet (border of Vietnam) was officially ground-breaking on 07 Jun 2023,*
3. *Feasibility Study (FS) is underway for Expressway PNH-KG Thom-Siem Reap-Poipet) and it is expected to complete by the end May 2023,*

Selected Projects that re-enforce regional freight connectivity

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Greater Mekong Subregion, Southern Economic Corridors

4. National Road 4 (NR4) from PNH-SHV is in the process of enlarging from 7-11m, some sections have been designed for 4-lane with flood preventive measures,
5. NR5 from PNH-Poipet (border of Thailand) has been enlarged to 4-lane, some sections have already been completed,
6. The existing railways are planned to upgrade to high-speed, and new rail line from PNH-Bavet is planned,
7. FS of Phnom Penh Logistics Complex is completed, and MPWT has just signed Financial Advisory Services Agreement (FASA) with IFC to develop SHV Logistics Complex,

4. Government Commitment to Decarbonization

Government Commitment to Decarbonization

- *Cambodia's updated National Determined Contribution (NDC) which sets the overall emission reductions of 42% by 2030 and Carbon Neutrality by 2050,*
- *The Ministry of Public Works and Transport (MPWT) has renewed its Climate Change Action Plan for Transport Sector 2020-2023 which sets 3 main strategic objectives as follows:*

Strategy 1: enhance climate adaptation and resilience in transport infrastructure.

Action plan:

- Developing climate proofed standards for road and bridge design, construction and maintenance for national and provincial roads and bridges,
- Repair and rehabilitate existing road infrastructure and ensure effective operation and maintenance system, taking into account climate change impact,
- Promoting construction and/or rehabilitation of road drainage at major urban areas, taking consideration on extreme weather or climate change,
- Strengthening the construction of road infrastructure at vulnerable areas of extreme event, taking consideration on climate proofed standard.

Strategy 2: promote emission mitigation in transport sector.

Action plan:

- Improving Vehicle Inspection and maintenance system,
- Promoting integrated public transport system in major cities,
- Promoting establishment of greenbelts along major roads for climate change mitigation,
- Promoting the Introduction of low emission vehicle and/or low-carbon fuels
- Promoting the modal shift for long-distance freight movement,
- Modernization of Traffic Control and Management in major cities to reduce traffic congestion,
- Promoting non-motorized transport – introduced cycle paths, sideways and pedestrian zones in major cities.

Strategy 3: strengthen institutional capacity, knowledge & awareness of climate change.

Action plan:

- Promote public awareness on climate change and its effect on transport sector,
- Developing a database for climate change data in the transport sector for statistics and data management, Monitoring and Evaluation, and reporting,
- Developing related policy for environmentally sustainable Transport System in Major cities,
- Promoting legal and regulatory framework for low-carbon development in transport,
- Promoting training on emergency responses to road transport damage, causing by extreme climate,
- Establishing Green Logistics Public-Private partnership to assist green logistics activities of private companies.

សូមអរគុណ! Thank You !

ក្រសួងសាធារណការ និងដឹកជញ្ជូន
អគ្គនាយដ្ឋានភ័ស្តុភារកម្ម
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អាសយដ្ឋាន: ផ្លូវ ៥៩៨ សង្កាត់ច្រាំងចំរេះ ២,
ខណ្ឌឫស្សីកែវ, រាជធានីភ្នំពេញ, ១២២០២, ប្រទេសកម្ពុជា

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