



Cambodia's Transport and Logistics Sector Toward 2033

GMS STF-26

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CONTENT

1. Overview of Transport and Logistics in Cambodia
2. About Comprehensive Masterplan on Cambodia Intermodal Transport and Logistics System (CITLS) 2023 -2033
3. About GMS Regional Investment Framework 2023-2025 for Cambodia's Transport Sector
4. Way Forward for GMS RIF 2025 - 2027

1. Overview of Transport and Logistics in Cambodia

- Current Status of Transport Infrastructure
- Road Transport Infrastructure
- Railway Infrastructure
- Waterway Transport
- Air Transport
- Logistics System
- Common Challenges



Current Status of Transport Infrastructure in Cambodia



Road network

Total 19,795 km in length (2022)
 (National & Provincial, not including rural road)

SHV-PP Expressway = 187,09 Km

Maritime & Waterway

Major Ports:
 - Sihanoukville Autonomous Port (PAS)
 - Phnom Penh Autonomous Port (PPAP)

Railway

2 main lines:
 - Northern line 386 Km
 - Southern line 266 Km

Aviation

Major Airports:
 - Phnom Penh International Airport
 - Siem Reap International Airport
 - Sihanoukville International Airport

Road Transport Infrastructure in Cambodia



Road Infrastructure of Cambodia continues to face several challenges:

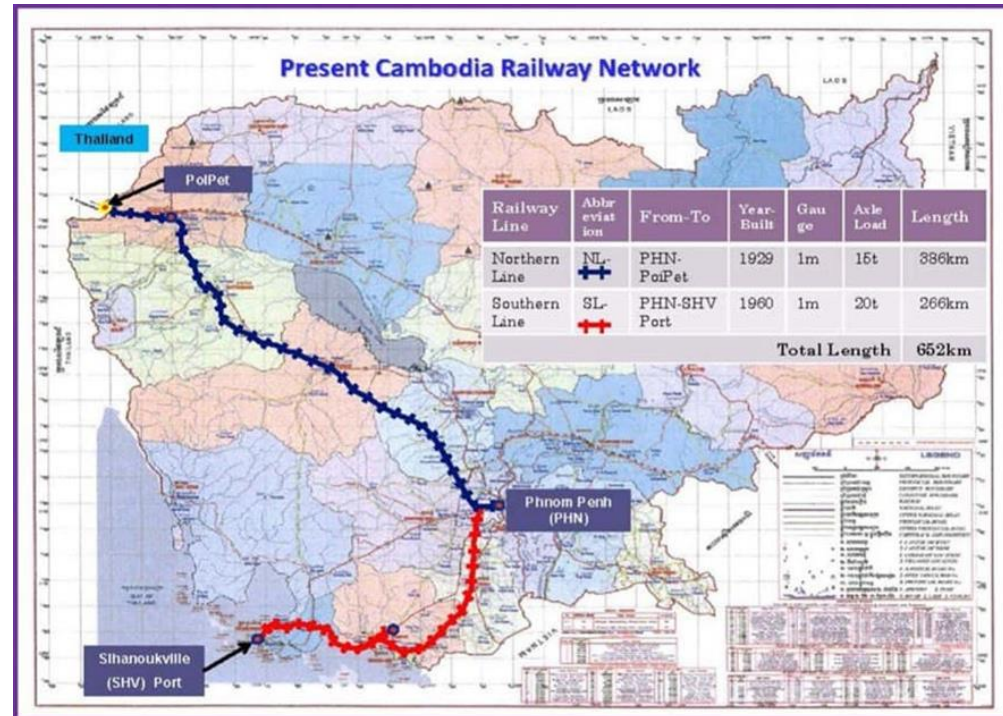
- ✓ Small size and low density of road network which are the main reasons to be perplexing and congested
- ✓ They are more gathered at the south, but less amount at the mountainous, northern and eastern area
- ✓ They are vulnerable to damage when there is disaster (flood)
- ✓ Transport connectivity between roads and other modes of transport is insufficient such as a road connecting to airports, railway stations, and ports, etc.,
- ✓ The overall technical standard of roads is limited due to the lack of budget, modern equipment, technique, and just-in-time and effective maintenance.

	Road Length (2022)	Road Network (2022)
National Road (1 digit)	2,254 Km	9
National Road (2 digits)	5,161 Km	72
Provincial Road	12,380 Km	750
Expressway	187 Km	1

Railway Network in Cambodia

Railway of Cambodia continues to face several challenges:

- ✓ The implementation of the Agreement for Joint Railway Traffic between Cambodia and Thailand has not started yet due to border crossing procedure (railway station, customs, immigration, business contract, etc.)
- ✓ Railway transport development is limited (slow) while the government is working to re-negotiate with current operator regarding new model of operation and investment.
- ✓ The density of the railway network in Cambodia is 35.9 km / 10,000 km², equivalent to 0.41 km/10,000 population.
- ✓ Compared to neighbouring countries, the density of the railway network in Cambodia is still low.



Logistics System in Cambodia

- The logistics centers in Cambodia are mostly dry ports or small distribution warehouses and are not concentrated and have limited-service capacity.
- The equipment of logistics complexes is insufficient, especially the lack of centralized logistics centers and the appropriate level of efficiency, which affects the storage, distribution, traffic, and management of distribution processes effectively, as well as creates unfavourable conditions for collecting, distributing and facilitating the transportation of goods on a large scale, resulting in higher logistics costs.
- The presence of some international companies such as APL Logistics, DSV, Panalpina, Yusen Logistics, Evergreen Marine Corporation (EMC), Sinotrans Limited, and China COSCO SHIPPING Corporation Limited, etc. have contributed to the promotion of logistics services in Cambodia in both level and size and to promote a system for Cambodia.

Logistics System in Cambodia (Cont.)

- Cambodia has 5 main international borders gates with neighbouring countries, including
 - Three Cambodia-Vietnam border gates,
 - One Cambodia -Thailand border gate, and
 - One Cambodia-Laos border gate.
- Most of these border gates are connected to Phnom Penh and other towns by road networks and National Road with one and two digits with two lanes (one direction per lane) which does not meet the need for efficient transportation.
- Cambodia does not have a complete railway connection with neighbouring countries.
- The railway connection between Cambodia and Thailand is better than others, but due to the international transit agreement, this line has not yet been activated.
- The Cambodia-Vietnam railway is a significant project of the railway network development plan, but the connection between the two countries and the source of funding has not been determined.
- Cambodia does not have a railway connection between Cambodia and Lao PDR, but it is on priority list for regional connectivity from Cambodia, to Lao PDR and Kunming, China.

Common Challenges of Transport and Logistics in Cambodia

The development of transport and logistics in Cambodia continues to face several other systemic challenges, as follows:

- Lack of common policies or interconnected plans
- Limitation of financing resources for public investment
- Limitation of effective implementation of the projects
- Limitation of resilience to climate change and natural disasters
- Lack of human resources

2. About Comprehensive Masterplan on Cambodia Intermodal Transport and Logistics System (CITLS) 2023 -2033

Institutional and Governance Framework

National Logistics Council (NLC)

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



National Logistics Steering Committee (NLSC)

Chaired by MPWT (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

General Overview of CITLS 2023-2033



- ✓ In collaboration with SNEC and support from various DPs, MPWT has developed the Comprehensive Intermodal Transport & Logistics System Master Plan 2023-2033 (CITLS-MP) which consist of 174 both hard and soft infrastructure projects with an estimation of US\$36.6 billion of investment for the next 10 years,
- ✓ CITLS-MP is a consolidation of master plans 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,
- ✓ CITLS-MP was officially approved by the Royal Government of Cambodia on 2nd Aug 2023.

About Comprehensive Masterplan on Cambodia Intermodal Transport and Logistics System (CILTS) 2023 -2033

VISION: “Continue to improve and develop transport and logistics system by focusing on promoting the development of hard and soft infrastructure towards highly inter-connected 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.”

Goal:

- 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**

About Comprehensive Masterplan on Cambodia Intermodal Transport and Logistics System (CITLS) 2023 -2033 (Cont.)

The Master Plan sets out the strategic frameworks as below:

- **Strategy 3-3-4-2** as the comprehensive **transportation system**
- **Strategy 2-2-N** as **logistics system**, considering and covering the economic, social, and industrial development plan, a combination of economic corridor factors and industrial conditions, population and geographical distribution, as well as the destination of transporting passengers and goods.

Strategy “3-3-4-2” comprehensive transportation system

3 Major Transport Corridors:

- PNH-SHV, PNH-Poipet, & PNH-Bavet

3 Secondary Transport Corridors:

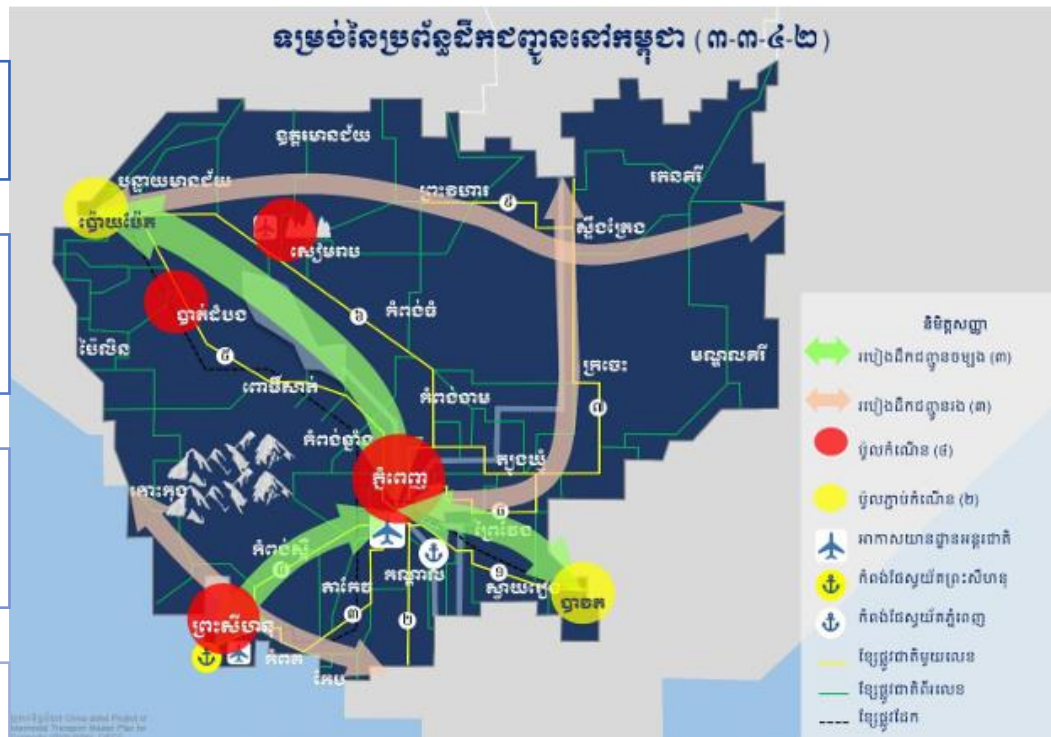
- Koh Kong-Prek Chak, PNH-Stung Treng, & O’Yadao-Poipet

4 Major Transport Hubs:

- PNH, SHV, Siem Reap (SR), & Battambang (BB)

2 External Transport Nodes:

- Serey Sophon-Poipet & Svay Rieng-Bavet



About Comprehensive Masterplan on Cambodia Intermodal Transport and Logistics System (CITLS) 2023 -2033 (Cont.)

Strategy “3-3-4-2” comprehensive transportation system

3 Major Transport Corridors

Corridor	Relevant Infrastructure
PNH-SHV	NR4, NR3, NR41, Expressway PNH-SHV, Southern Railway, PPAP, PAS, New Techo Int’ Airport and SHV Airport,
PNH-Poipet	NR5, NR6, Expressway PNH-SR-Poipet, Northern Railway, SR Port, Battambang Port, Pursat Port, PPAP, New Techo Int’ Airport, New SR Angkor Airport, & New Poipet Airport,
PNH-Bavet	NR1, NR2, Expressway PNH-Bavet, New Railway PNH-Bavet, PPAP, Bassac River, New Techo Int’ Airport,

3 Secondary Transport Corridors

Corridor	Relevant Infrastructure
Koh Kong-Prek Chak	NR55, NR48, NR33, NR10, Expressway Koh Kong-SHV-Kampot (Vietnam border), Koh Kong Port, Kampot Port, Kep Port, & Dara Sakor + Koh Kong + SHV Airports,
PNH-Stung Treng	NR7, NR8, Expressway PNH-Stung Treng, Stung Treng + Kratie + Tunle Bet + PPAP ports, & New Techo Int’ Airport,
Poipet-O’Yadao	NR9, NR10, NR64, NR78, Expressway Poipet-SR-PNH, New Poipet Airport & New SR Airport,

About Comprehensive Masterplan on Cambodia Intermodal Transport and Logistics System (CITLS) 2023 -2033 (Cont.)

Strategy “3-3-4-2” comprehensive transportation system

4 Transport Hubs	
Transport Hub	Relevant Infrastructure
Phnom Penh (PNH)	<ul style="list-style-type: none"> - Expressway: PNH-SHV, PNH-Poipet, PNH-Bavet, - Roads: NR1-6, NR20, NR20A, NR21B, NR42, PR114, PR130, & RR1-3, - Railway: PNH-Poipet, PNH-SHV & PNH-Bavet, - New Techo Int' Airport, PPAP, Phnom Penh Logistics Complex (PPLC),
Sihanoukville (SHV)	<ul style="list-style-type: none"> - Expressway: PNH-SHV, Koh Kong-SHV-Kampot, - Roads: NR3, NR4, NR45, PAS, Stung Hav Port, Railway PNH-SHV, SHV Airport & Sihanoukville Logistics Complex (SHV-LC),
Siem Reap (SR)	<ul style="list-style-type: none"> - Expressway: PNH-SR-Poipet, - NR6, NR64, NR66, NR67, NR68, PR201, PR202, PNH-SR Waterway, New SR Airport, & SR Logistics and Commercial Centers,
Battambang	<ul style="list-style-type: none"> - NR5, NR10, Battambang-SR road link, Battambang Port & Agricultural Crop Logistics Center,
2 External Transport Nodes	
Serey Sophon-Poipet	NR5, Northern Railway, New Poipet Airport, & Logistics Park,
Svay Rieng-Bavet	NR1, PNH-Bavet Expw, PNH-Bavet New Railway, & Logistics Park

About Comprehensive Masterplan on Cambodia Intermodal Connectivity and Logistics System (CILTS) 2023 -2033 (Cont.)

Strategy 2-2-N as Logistics system:

2 Cores

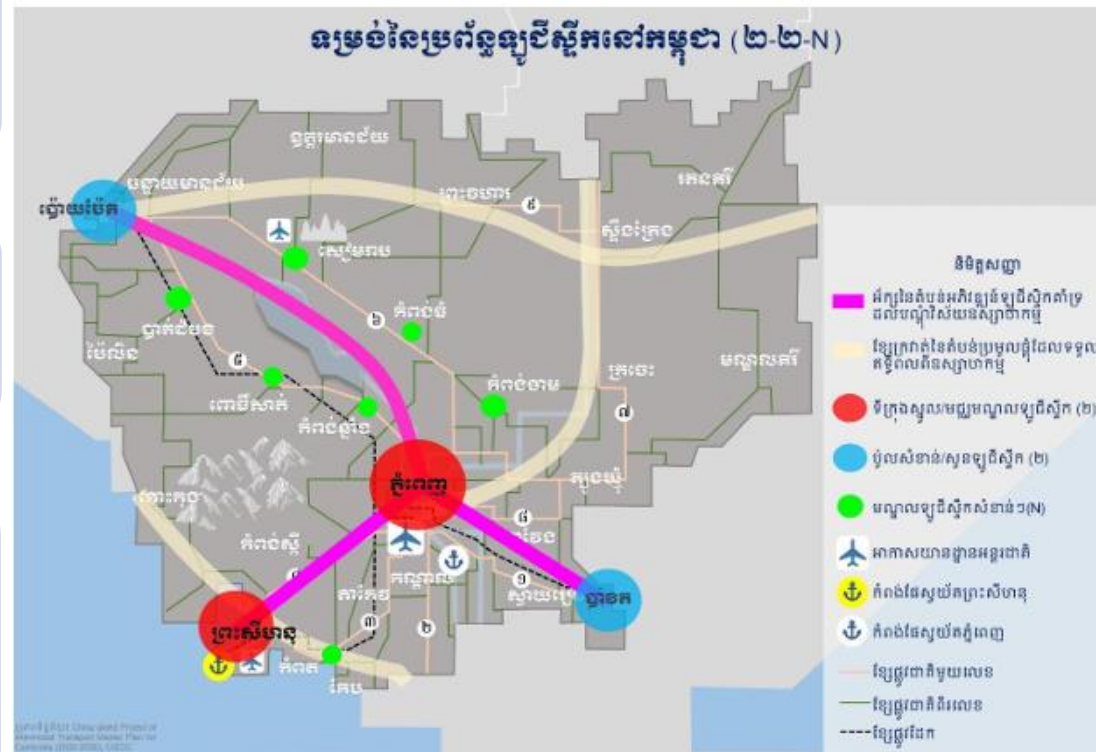
- PNH and SHV Logistics Complexes,

2 Poles

- Poipet and Bavet Logistics Complexes,

N

- Logistics Centers in Siem Reap, KG Thom, KG Cham, Banteay Meanchey, Battambang, Pursat, KG Chhnang, & Kampot



About Comprehensive Masterplan on Cambodia Intermodal Transport and Logistics System (CILTS) 2023 -2033 (Cont.)

List of Intermodal Transport Projects in short & medium term (2023-2027) and long term (2028 – 2033)

No.	Type of Project	Investment Cost Estimate (USD Million)	Number of Projects	Short & Medium term (2023-2027)		Long term (2028-2033)	
				Number of Projects	Investment Cost Estimate (USD Million)	Number of Projects	Investment Cost Estimate (USD Million)
1	Road Projects	13,602.43	94	35	7,141.83	59	6,460.60
1.1	Expressway Projects	7,173.69	9	4	4,184.81	5	2,988.88
1.2	National Road, Provincial Road, and other main roads	6,428.74	85	31	2,957.02	54	3,471.72
2	Railway Projects	10,010	8	4	3,800	4	6,210
3	Inland Waterway Projects	3,251	23	16	2,561	9	690
4	Maritime Projects	5,461	20	14	2,494	9	2,967
5	Air Transport Projects	3,297.90	10	10	3,297.90	0	0
6	Logistics Projects	957.50	15	9	630	8	327.50
7	Additional Projects	99.30	4	2	1.30	2	98
Total		36,679.13	174	90	19,926.03	91	16,753.10

About Comprehensive Masterplan on Cambodia Intermodal Connectivity and Logistics System (CILTS) 2023 -2033 (Cont.)

List of Logistics Project

No.	Transport Corridor or growth pole, poles connecting the growth	Name of Project	Size of Construction	Investment Cost Estimate (USD Million)	Short-medium term (2023-2027)	Long term (2028-2033)
1	Development of key Logistics Complexes and Poles	Development of Phnom Penh Logistics Complex (PPLC)	There is a northwest and southeast external transport node of PPLC and Air Cargo Hub on areas of 150 hectares	220	1	
2		Development of Sihanoukville Logistics Complex (SHV-LC)	100 hectares	120	1	
3		Development of Bavet Logistics Park	70 hectares	80		1
4		Development of Poi Pet Logistics Park	80 hectares	90		1
5		Development of Siem Reap Logistics and Commercial Centre	50 hectares	60		1
6		Development of Kampot Industrial Logistics Center	50 hectares	60		1
7		Development of Kampong Cham Agricultural Logistics Center	50 hectares	60	1	
8		Development of Grain Logistics Center	Each logistics center covers areas of 30 hectares and there are 5 logistics center in total	200	1	

About Comprehensive Masterplan on Cambodia Intermodal Connectivity and Logistics System (CILTS) 2023 -2033 (Cont.)

List of Logistics Project (Cont.)

No.	Transport Corridor or growth pole, poles connecting the growth	Name of Project	Size of Construction	Investment Cost Estimate (USD Million)	Short-medium term (2023-2027)	Long term (2028-2033)
9	Information platform of Project for SMART and Effective Logistics development	Logistics Big Data Centre		8	1	
10		Government's monitoring and services platform		10		1
11		Logistics Association and Enterprise Resources Information System development		15		1
12		SMART Logistics Park Information System platform development	Covering the PPLC and SHV-LC and Bavet and Poi Pet Logistics Parks	20	1	1
13		Enhancement of Logistics Management Institution	Secretariate of NLC (National Logistics Council) and NLSC (National Logistics Steering Committee)		4	1
14		Logistics Professional Training Centre development	2,000 square meters for Phase 1	6	1	
15	Improvement of Logistics Policy Framework			4.5	1	1
Total				957.5	9	8

3. About GMS Regional Investment Framework 2023-2025 for Cambodia's Transport Sector

Cambodia Updates to the GMS RIF 2023 -2025

No.	Type ¹	Project Title	Year of Commencement	Cost Estimate (\$ million)	Potential Funding Source ⁺ and Amount (\$ million) ²	Project Contact
Transport						
1	Investment	Integrated Road Network Improvement Project	2023	150.00	Development Partner	H.E. Pheng Sovicheano, Secretary of State, MPWT
2	TA	Sustainable Road Network Improvement Project, Svay Rieng Province (SRNIP)	2023	1.00	Development Partner	H.E. Pheng Sovicheano, Secretary of State, MPWT
3	Investment	Sustainable Road Network Improvement Project, Svay Rieng Province (SRNIP)	2024	50.00	Development Partners	H.E. Pheng Sovicheano, Secretary of State, MPWT
4	TA & Investment	Safer Access Road Network Improvement Project	2023	1.20	Development Partner	H.E. Pheng Sovicheano, Secretary of State, MPWT
5	Investment	Safer Road Network Improvement Project (SRNIP)	2024	100.00	Development Partners	H.E. Pheng Sovicheano, Secretary of State, MPWT
6	TA On-going	Feasibility Study for Steung Bot International Railway Station and the Rehabilitation of Sereisophorn and Battambang Station Facilities, in Banteay Mean Chey and Battambang Province	2023	6.00	Development Partners	Mr. Ouk Ourk, Director of Railway Department, Ministry of Public Works and Transport
7	TA On-going	Development of Regional Logistics Complex	2023	50.00	Development Partner	H.E. Chhieng Pich General Department of Logistics, Ministry of Public Works & Transport
8	TA On-going	Construction of Logistics Complex in Bavet	2023	50.00	DP	H.E. Chhieng Pich General Department of Logistics, Ministry of Public Works & Transport

Cambodia Updates to the GMS RIF 2023 -2025

No.	Type ¹	Project Title	Year of Commencement	Cost Estimate (\$ million)	Potential Funding Source ⁺ and Amount (\$ million) ²	Project Contact
9	TA	Kampong Chnang Logistics Special Zone	2023	2.80	Development Partner	H.E. Chhieng Pich General Department of Logistics, Ministry of Public Works & Transport
10	TA & Investment	Investment: Improvement of Cross-Border Logistics and Transport System in Bavet city (Construction of PR316D and new cross-border facilities)	2023	23.00	Development Partner	H.E. Chhieng Pich General Department of Logistics, Ministry of Public Works & Transport
11	TA On-going	Development of Railway Regulatory Framework	2023	16.00	Development Partner—16.0	Mr. Ouk Ork, Director General of Logistics, Department of Railway, Ministry of Public Works & Transport

Private Sector Involvement

As of 2024, 04 projects under pipeline of RIF 2023-2025 have been implemented and under way of conducting FS . However, only 3 projects are private sector involvement as follows:

Project Title	Status
Feasibility study for Steung Bot International Railway Station and the Rehabilitation of Seriesophorn and Battambang Station facilities	TA Prepared by NEDA
Development of Regional Logistics Complex	TCP by JICA
Construction of Logistics Complex in Bavet	TA by China Study Team

4. Way Forward for GMS RIF 2025 - 2027

Cambodia's Proposed GMS RIF 2025 - 2027

No.	Project Title	Cost Estimate (\$ million)
1	Integrated Road Network Improvement Project	150.00
2	TA: Sustainable Road Network Improvement Projects, Svay Rieng Province (SRNIP)	1.00
3	Investment: Sustainable Road Network Improvement Projects, Svay Rieng Province (SRNIP)	50.00
4	TA: Safer Access Road Network Improvement Project	1.20
5	Investment: Safer Road Network Improvement Project	100.00
6	Feasibility Study for Steung Bot International Railway Station and the Rehabilitation of Sereisophorn and Battambang Station Facilities, in Banteay Mean Chey and Battambang province	6.00
7	Development of Regional Logistics Complex	50.00
8	Construction of Logistics Complex in Bavet	50.00
9	Kampong Chhnang Logistics Special Zone	2.80
10	Investment: Improvement of Cross-Border Logistics and Transport System in Bavet city (Construction of PR316D and New Cross-Border Facilities)	23.00
11	TA: Improvement of Cross-Border Logistics and Transport System in Bavet city (Construction of PR316D and New Cross-Border Facilities)	1.50
12	Development of Railway Regulatory Framework	16.00

Cambodia's Proposed GMS RIF 2025 - 2027

Proposed projects related to supply logistics and chain

There are 05 out of 12 projects are designed to accelerate supply chains and logistics.

Project Title	Status
Feasibility study for Steung Bot International Railway Station and the Rehabilitation of Seriesophorn and Battambang Station facilities	TA Prepared by NEDA
Development of Regional Logistics Complex	TCP by JICA
Construction of Logistics Complex in Bavet	TA by China Study Team
Kampong Chhnang Logistics Special Zone	-
Investment: Improvement of Cross-Border Logistics and Transport System in Bavet city (Construction of PR316D and New Cross-Border Facilities)	-
TA: Improvement of Cross-Border Logistics and Transport System in Bavet city (Construction of PR316D and New Cross-Border Facilities)	-

Way Forward for GMS RIF 2025 - 2027



- Relevant projects under the CITLS 2023-2033 shall be prepared, prioritized and included in the GMS RIF 2025-2027 and Transport Sector Strategy (TSS) 2030,



- General Department of Logistics (GDL) shall work closely with GMS secretariate and stakeholders as a supporting working group for **national focal point of MPWT** to coordinate, collect inputs and project concept paper, update progress of project pipeline under GMS RIF 2025-2027, and onward.

Suggestion to GMS Secretariate

- More capacity building programs should be provided to GMS countries for the preparation of project concept paper, monitoring and implementation of project under the RIP project pipeline,
- Knowledge Sharing Workshop should be conducted to give hints and share good examples of transport and logistics projects, particularly climate adaptation projects to prevent natural disasters,
- Site visits at successful project locations should be done to learn best practices and expand networking.

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Thanks for your attention!

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