

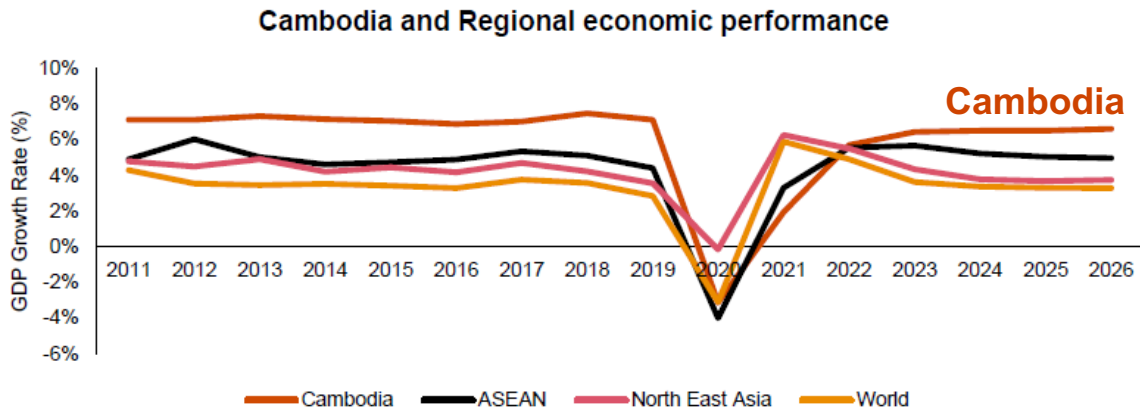
# PHNOM PENH LOGISTICS COMPLEX

*Eric Chan*  
*Head of Corporate Development*  
*YCH Group*



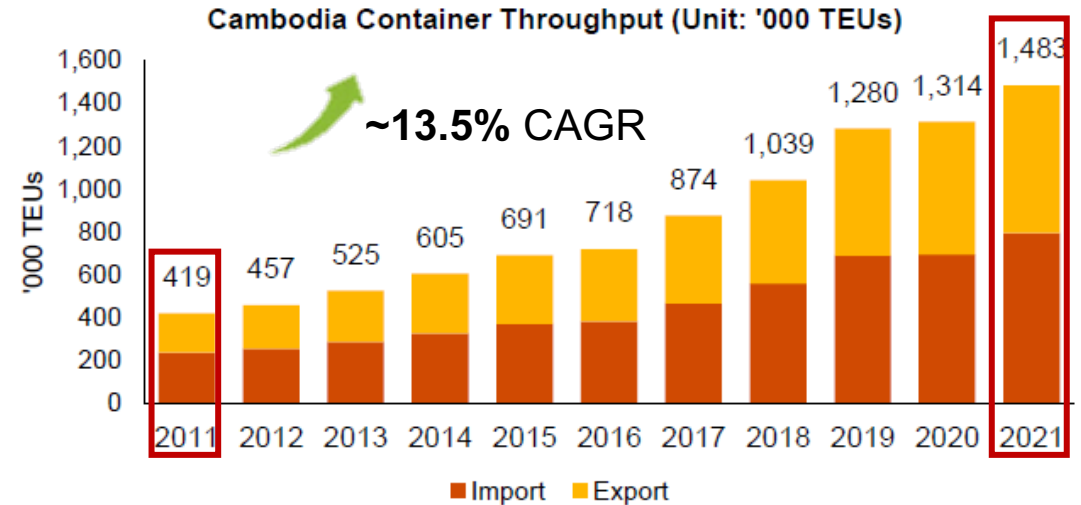


# LONG-TERM GROWTH PROSPECTS

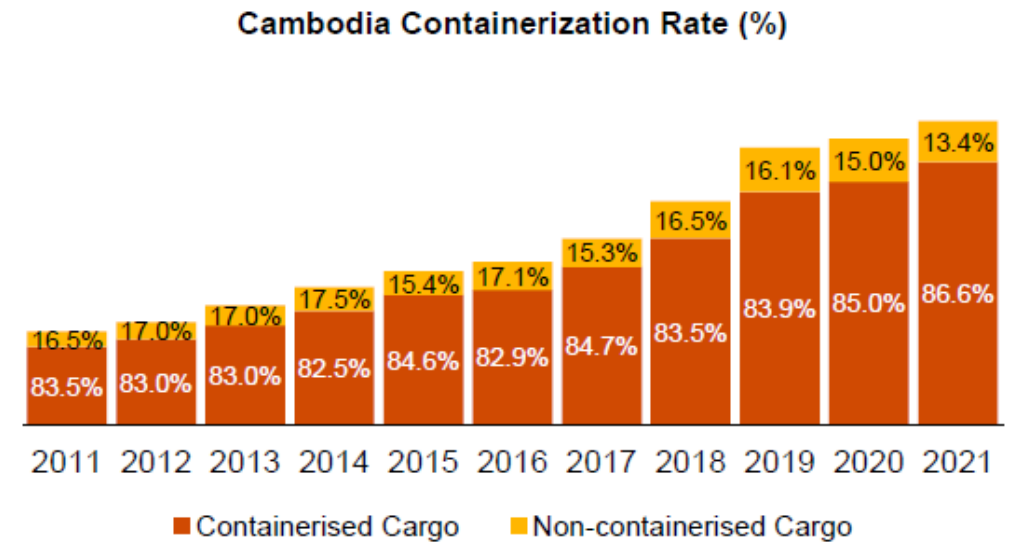


Source: IMF World Economic Outlook Data

- Cambodia's GDP grew by 7%+ from 2011 to 2019. The economic growth is projected at **5.8%** in **2024** and **6.1%** in **2025**.
- **USD 28bn** in infrastructure investments required **2016-2040** to sustain the economic growth based on the estimation.
- RGC actively implements **substantive policy reforms** to attract investments and stimulate economic growth. *(Law on investment; PPP Law, free-trade agreements etc.)*

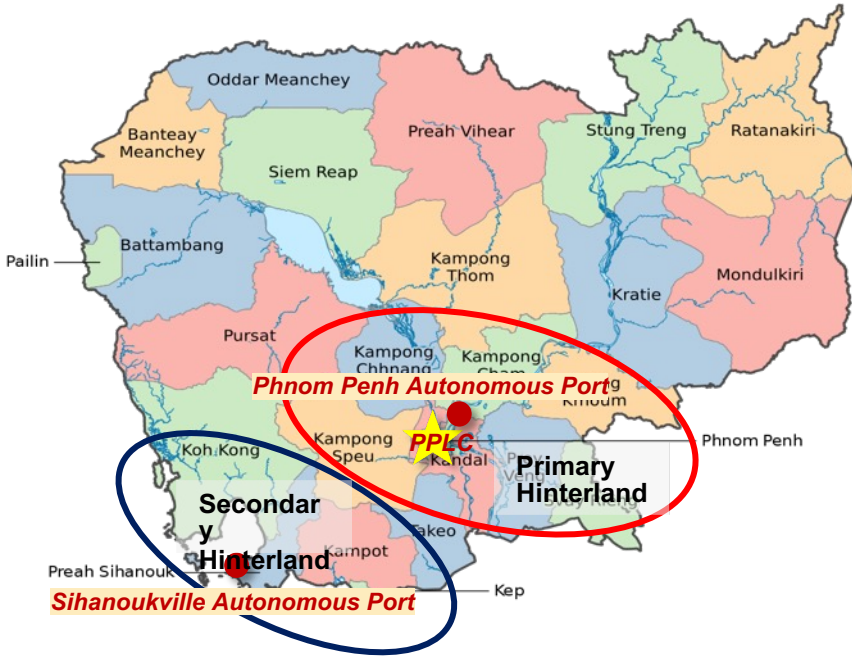


Source: PPAP and PAS Annual Reports, 2011-2021



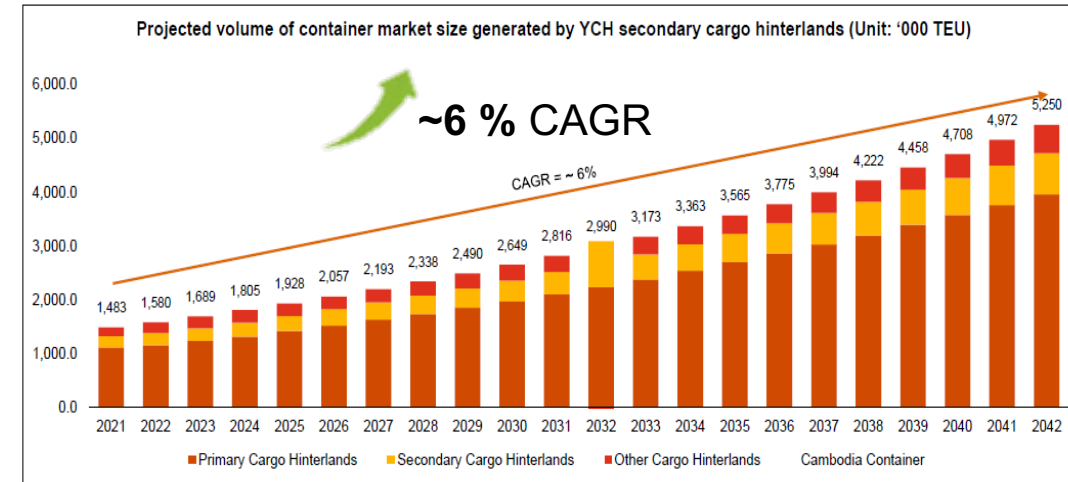
Source: Sihanoukville Port and PPAP port and Custom houses at border gate

# OUTLOOK OF EX-IM CARGO VOLUME



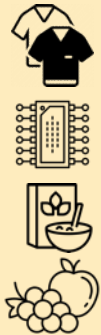
## Hinterland Highlights:

- 60% Export TEU by PAS
- 24.6% of container traffic handled by PPAP
- 90% garment & footwear
- Major fruit export to CN
- Major Agri-related economy
- Sihanoukville SEZ



Source: GMAPS 2022 forecasting model

## Major Export Commodities (USD: Bn, 2022)



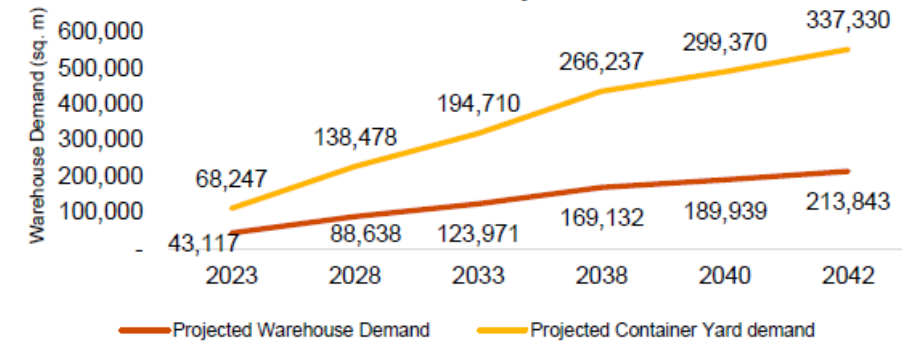
1. Garment: 12.7
2. Electrical parts: 2
3. Cereals: 0.4
4. Fruits, Nuts: 0.2

## Major Import Commodities (USD: Bn, 2022)



1. Natural Precious: 4.7
2. Mineral fuels: 3.7
3. Knitted fabrics: 2.9
4. Vehicles: 2.4

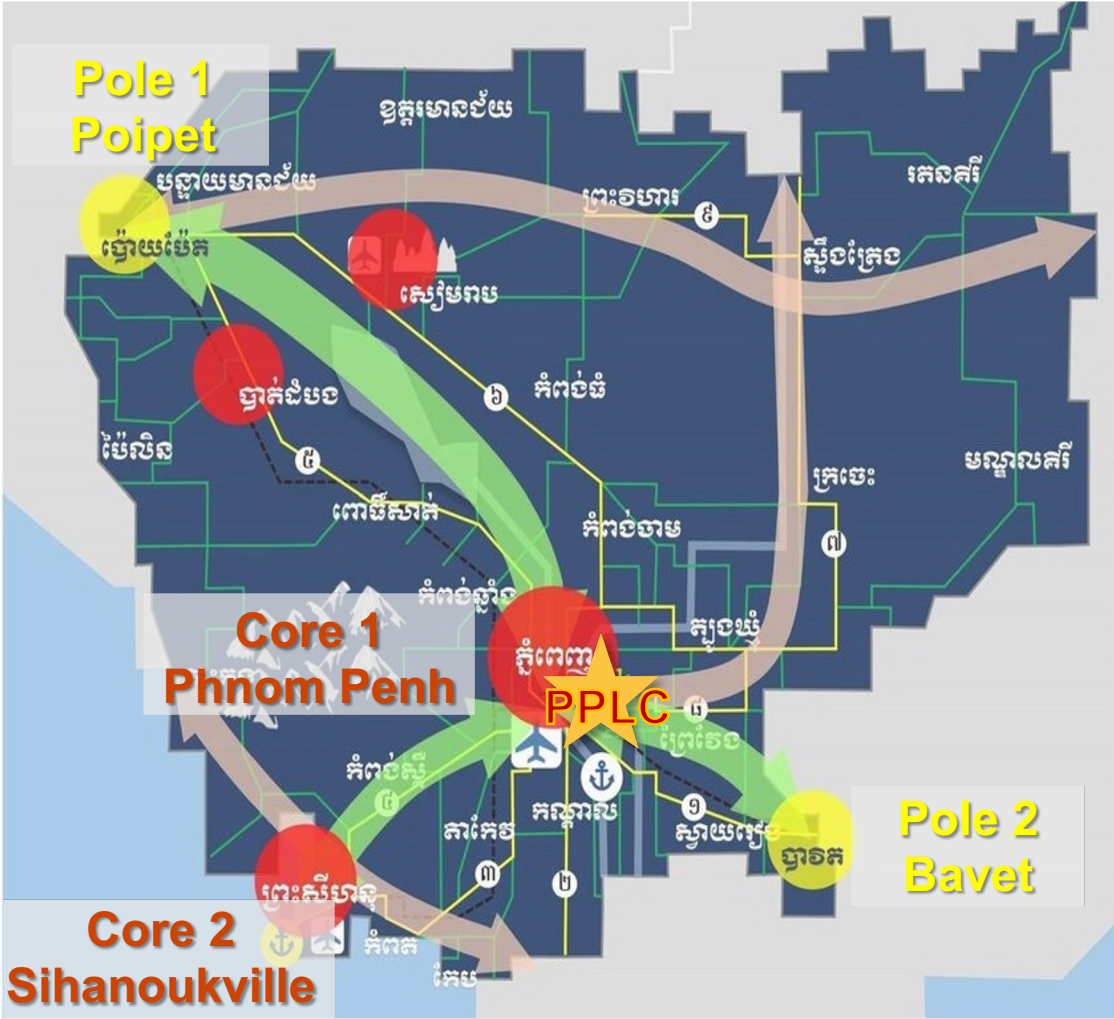
## Total demand for PPLC's warehouse space and container yard



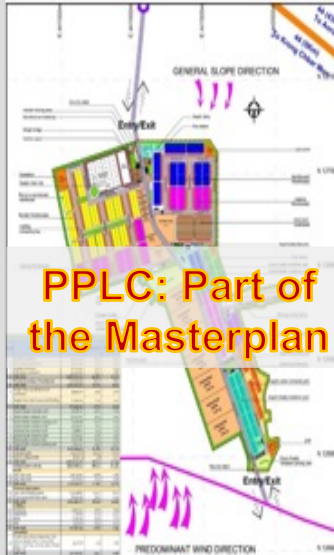
Source: GMAPS 2022 forecasting model



# THE COMPREHENSIVE INTERMODAL TRANSPORT AND LOGISTICS SYSTEM MASTER PLAN(CITLS) 2023-2033



Layout of Strategy 3-3-4-2 with 2-2-N from CITLS



PPLC: Part of the Masterplan

- Illustrates**
- Major transport corridors
  - 2nd transport corridors
  - Transport hub
  - External Transport Node
  - Airport
  - PAS
  - PPAP
  - PPLC

**3-3-4-2:** 3 Major & 3 Secondary transport corridors, 4 Transport hubs, 2 Ext. Transport nodes

**2-2-N:** 2 Core cities, 2 Major poles, main logistics centers



Nov 2022: PPLC Unveiled at 41st ASEAN Summit

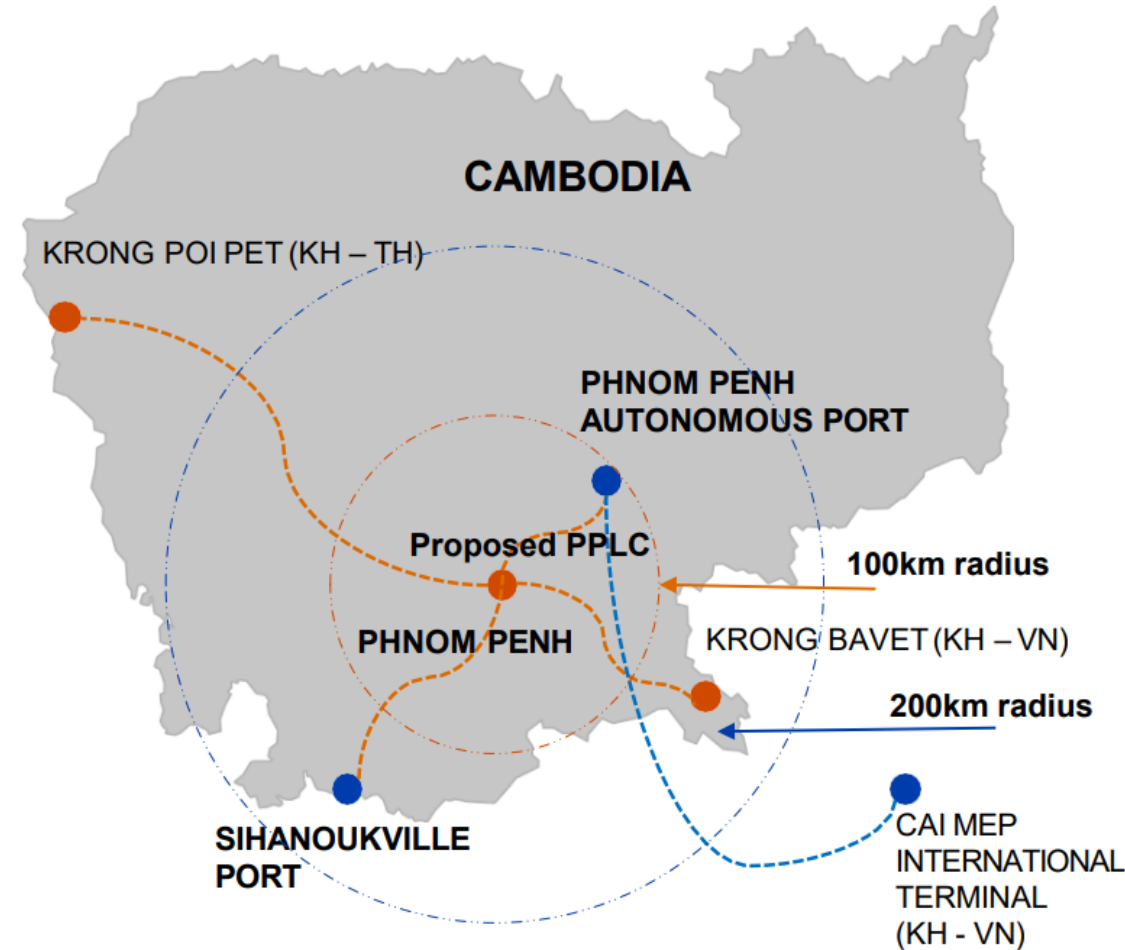
## Key Value Propositions of PPLC

A strategic location well-connected by the national transportation network.

An intermodal logistics complex with advanced facilities and one-stop logistics solutions.

An extended synergy with national ports (PPAP & PAS); create a seamless and comprehensive logistics network.

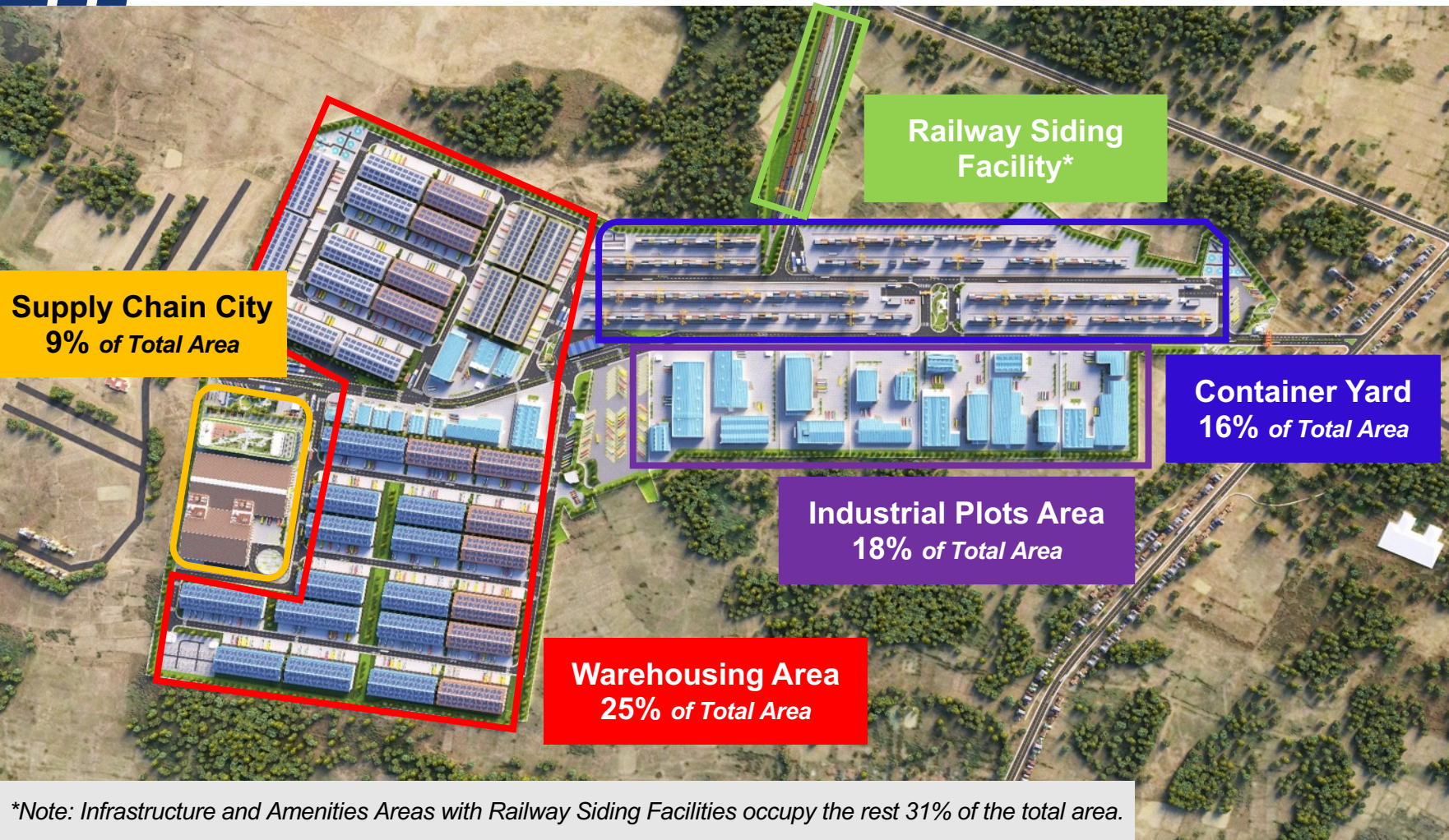
An infrastructure with international standards to reduce logistics cost and enhance connectivity.



Source: PPLC Feasibility Study



# PHNOM PENH LOGISTICS COMPLEX(PPLC)



## PPLC offers diversified services

- Industrial Plots
- OACT (Off Airport Cargo Terminal)
- Single-Window Customs
- Cold Storage Warehouse
- Freight Forwarders
- Truckers/Hauliers
- Smart Technologies
- ICD Operator
- Port Operator
- Railway Operator
- Other Logistics Service



**Preparation Period**  
2023 – 2024

**Phase 1 A & B**  
Q1'25 – Q1'28

**Phase 2 A & B**  
Q3'26 – Q3'41



# PART OF SMART GROWTH CONNECT (SGConnect™)



## Grow our cities without growing pains

The Smart Growth Connect ( **SGConnect™** ) is an ASEAN-BAC 2018 legacy project that aims to pilot **Smart Growth Centres** in each ASEAN state, each centre with varying sophistication of technologies and human capital intensity but similar in resource productivity and efficiency to serve the local population.



**Supply Chain City® (Singapore) – Centre of Excellence (COE)**  
Using the **LEARN™** ecosystem approach, we can **build for tomorrow by connecting today!**



Part of  
**ASEAN SMART LOGISTICS NETWORK (ASLN)**





# CALL FOR ACTION

- **CONNECTIVITY – Strategic Multi-modal Node of CITLS .**
- **EFFICIENCY – Extended Ports Gateway; Single-Window Customs.**
- **FUTURE-READY – Automation and Digital Technologies.**
- **SUSTAINABILITY – Net-Zero Park; Renewables, EV infrastructure.**
- **Be part of the Kingdom’s next phase of development**





SuperPort™  
Phnom Penh



**THANK YOU!**