POLICY FOR SUSTAINABLE PORT DEVELOPMENT IN VIETNAM

Ha Noi, July 2022
MAIN CONTENTS

CURRENT STATUS OF VIETNAM SEAPORT

MASTER PLAN OF VIETNAM SEAPORT

SOLUTION FOR SUSTAINABLE PORT DEVELOPMENT
STATUS VIETNAM ECONOMY

Imp-Exp (Bil. USD)

<table>
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<tr>
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<th></th>
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</thead>
<tbody>
<tr>
<td>Value</td>
<td>13.6</td>
<td>18.4</td>
<td>20.8</td>
<td>31.2</td>
<td>111.2</td>
<td>480.0</td>
<td>545.4</td>
<td>668.5</td>
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</table>

Source: WB

1995 ASEAN
1996 ASEM
1998 APEC
2007 WTO
2018 CPTPP
2020 EVFTA
## STATUS VIETNAM ECONOMY

### 2000

<table>
<thead>
<tr>
<th>Country</th>
<th>GDP</th>
<th>Percentage</th>
</tr>
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<tbody>
<tr>
<td>Vietnam</td>
<td>31.2</td>
<td>7.2%</td>
</tr>
<tr>
<td>Thailand</td>
<td>126.4</td>
<td>21.8%</td>
</tr>
<tr>
<td>Singapore</td>
<td>96.1</td>
<td>22.3%</td>
</tr>
<tr>
<td>Philippines</td>
<td>83.7</td>
<td>19.4%</td>
</tr>
<tr>
<td>Malaysia</td>
<td>93.8</td>
<td>17.8%</td>
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### 2021

<table>
<thead>
<tr>
<th>Country</th>
<th>GDP</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Vietnam</td>
<td>362.6</td>
<td>17.8%</td>
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<tr>
<td>Thailand</td>
<td>506.0</td>
<td>18.3%</td>
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<tr>
<td>Singapore</td>
<td>397.0</td>
<td>24.9%</td>
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<tr>
<td>Philippines</td>
<td>394.1</td>
<td>19.4%</td>
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<tr>
<td>Malaysia</td>
<td>372.7</td>
<td>19.5%</td>
</tr>
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</table>

Source: WB and author's analysis
STATUS VIETNAM ECONOMY

GDP (bil. USD)

Source: WB and author's analysis

GOOD VIA SEAPORT (Mil.Tons, Teus)

Source: Vinamarine
CURRENT STAGE OF SEA PORT SYSTEM

TOTAL: 34 PORTS, 296 BERTHS, 750 MIL.TONS (CAPACITY)

Source: Vinamarine
CURRENT STAGE OF SEA PORT SYSTEM

SHARE OF GOODS . 2021 (Mil.Tons, %)

Source: Vinamarine and author's analysis
MAIN SEA ROUTES FROM VIETNAM SEAPORT

- Hai Phong Port
  - 24 Intra-Asia routes
  - 02 US – Asia routes
  - Max ship 12,000 TEU

- Vung Tau Port
  - 89 Intra-Asia routes
    (83 routes from Cat Lai)
  - Max ship 4,000 TEU

- HCM Port
  - 09 Intra-Asia routes
  - 20 US – Asia routes
  - 02 Asia - Europe routes
  - Max ship 18,000 TEU

Source: Vinamarine
MAIN CONTENTS

- CURRENT STATUS OF VIETNAM SEAPORT
- MASTER PLAN OF VIETNAM SEAPORT
- SOLUTION FOR SUSTAINABLE PORT DEVELOPMENT
OVERVIEW OF VIETNAM SEAPORT PLANNING

Underdeveloped economy
- 20 km length;
- 80 Mil.T/Yr;
- Backward exploitation;
- Weak connection;

1st Master Plan (2000)
- International economic integration
  - 40km Length
  - 270 Mil.T/ Yr.
  - Focus on 14 general national seaports;
  - Capacity building;
  - Relocating seaport.

2nd Master Plan (2010)
- Expanding international economic integration
  - 96km Length;
  - 730 Mil.T/ Yr;
  - Focus on Gateway and important seaports;
  - Improvement in port capacity and port operation technical.

3rd Master Plan (2020)
- Sustainable Development
  - Focus on Gateway and important seaports;
  - Logistics development.
  - Improve the efficiency of port development management.
  - Develop green port.
SEA PORT MASTER PLANNING PERIOD 2021-2030

TOTAL GOODS FORECAST (mil.T)

<table>
<thead>
<tr>
<th>Year</th>
<th>2020</th>
<th>2030</th>
<th>2050</th>
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<tbody>
<tr>
<td>Value</td>
<td>0</td>
<td>692</td>
<td>1140</td>
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CONTAINER FORECAST (mil.Teus)

<table>
<thead>
<tr>
<th>Year</th>
<th>2020</th>
<th>2030</th>
<th>2050</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value</td>
<td>0</td>
<td>22.1</td>
<td>38</td>
</tr>
</tbody>
</table>

ESTIMATED INVESTMENT CAPITAL (mil.T)

313.000 Bil.VN Dong (14 bil.US Dolar)

95% outside the state budget

Source: Vinamarine
MAIN CONTENTS

1. CURRENT STATUS OF VIETNAM SEAPORT
2. MASTER PLAN OF VIETNAM SEAPORT
3. SOLUTION FOR SUSTAINABLE PORT DEVELOPMENT
1. Planning seaports with other traffic infrastructure;
   - Based on the overall forecast of transportation development demand;
   - Seaports are prioritized for location selection;

2. Seaport planning is associated with relevant specialized plans, major production and consumption hubs;
MOBILIZING AND USING CAPITAL

PRIORITY PUBLIC INFRASTRUCTURE PROJECTS

Cam Pha channel (Quang Ninh - 200,000 DWT)

Chanh channel (Hai Phong - 50,000 DWT)

Nghi Son channel (Thanh Hoa - 50,000 DWT)

Tho Quang channel (Da Nang - 20,000 DWT)

Cai Mep – Thi Vai channel (BRVT - 200,000 DWT)

Hau channel (Tra Vinh – Phase 2 - 20,000 DWT)

Other channels; maritime safety infrastructure.
MOBILIZING AND USING CAPITAL

PRIORITY BERTH INFRASTRUCTURE PROJECTS

Hai Phong Gateway port - 18,000 TEUs

- Main berths in Port type I (15 ports);
- Passenger terminals in tourism dynamic zones;
- Berths serving coastal industrial zones, power plant, metallurgy;
- Promoting investment attraction in potential berths (Van Phong, Tran De).

BR-VT Gateway port - 24,000 TEUs
MOBILIZING AND USING CAPITAL

PRIORITY PUBLIC INFRASTRUCTURE PROJECTS

Cam Pha channel (Quang Ninh - 200,000 DWT)

Chanh channel (Hai Phong - 50,000 DWT)

Nghi Son channel (Thanh Hoa - 50,000 DWT)

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Cai Mep – Thi Vai channel (BRVT - 200,000 DWT)

Hau channel (Tra Vinh – Phase 2 - 20,000 DWT)

Other channels; maritime safety infrastructure.
1. The Ministry of Transport approved the Green Port Project
   - 2020-2025: Develop and issue basic standards on green port criteria
   - 2025-2030: Develop and issue national technical standards on green port criteria.
   - After 2030: Compulsory application of green port criteria in port development.

2. Vietnam's commitment at the summit on climate change (COP 26). Zero net emissions by 2050
Thanks for your attention!