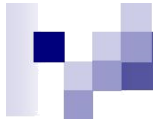


THE DEVELOPMENT OF INLAND CLEARANCE DEPORTS (ICDs) IN VIETNAM

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CONTENT

- I. Current ICDs in Viet Nam
- II. ICD Development Master Plan
- III. Draft of ICD Development Detailed Plan
- IV. Challenges and Opportunities

I. Current ICDs in Viet Nam

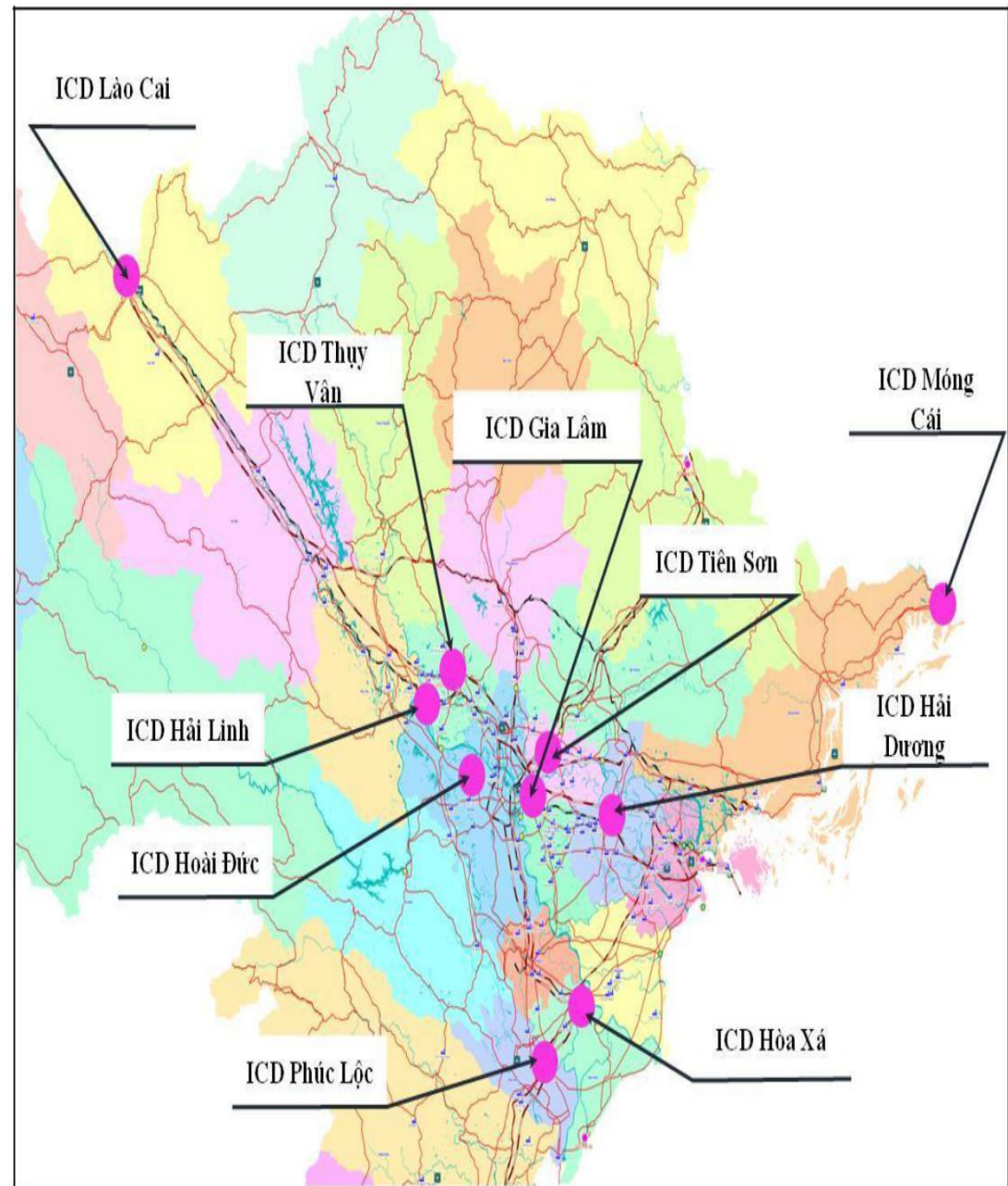
1. In the Northern Region

10 ICDs connected to Hai Phong seaport with a total area of 70 hectares

- **Scale:** Small. Most of ICDs <10ha (only 3 ICDs > 10ha)

- **Mode of Transportation:** Mainly by trucking (Lao Cai - railways; Phuc Loc - inland waterways);

- **Portion of container clearance:** Small. 0.2% of the containers through the Haiphong port

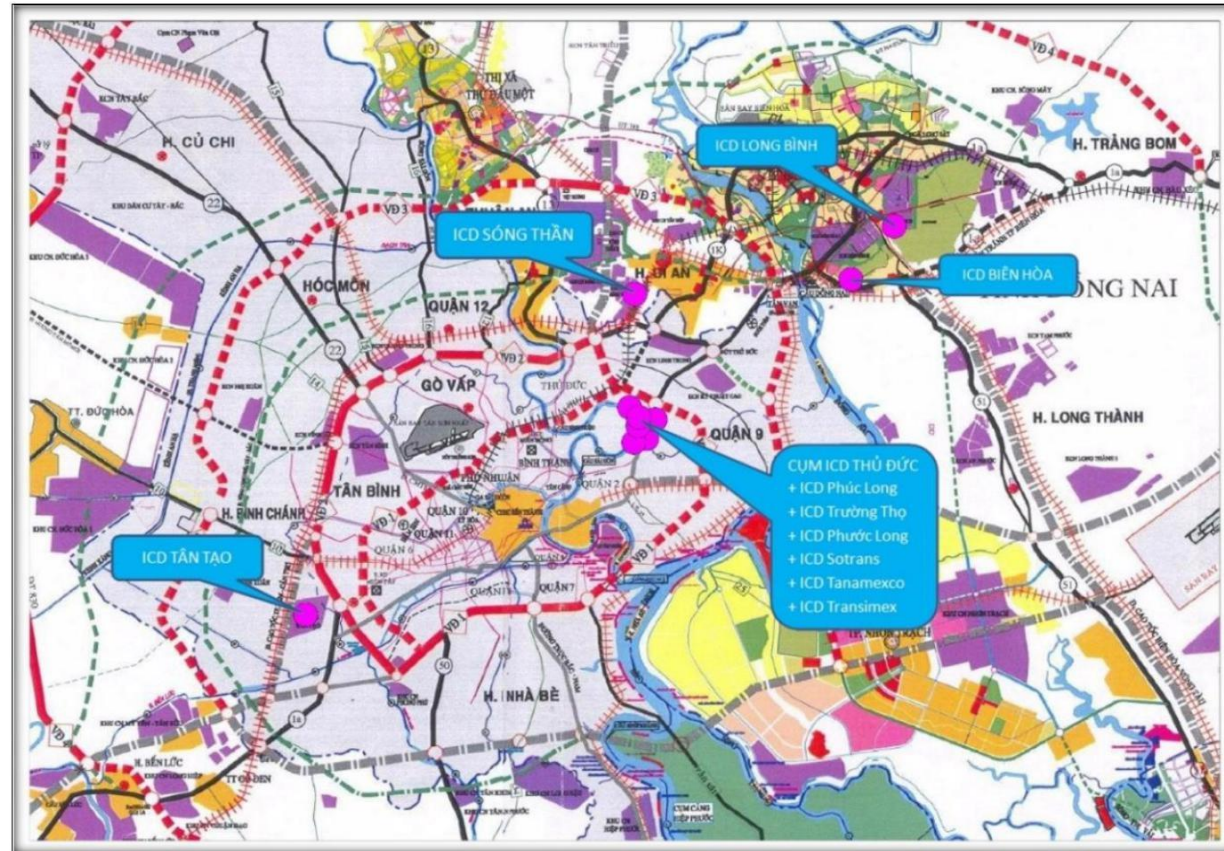


I. Current ICDs in Viet Nam

2. In the Southern Region

10 ICDs with a total area
of 300 hectares

- **Scale:** Larger. Most of ICDs >10ha
- **Mode of transportation:** Mainly by waterways and trucking;
- **Portion of container clearance:** 35-40% of the containers





II. ICD Development Master Plan

On 13 December 2011, the Prime Minister issued Decision No. 2223/QĐ-TTg on the Planning on development of Vietnam's system of inland clearance depots toward 2020, with orientation to 2030.

By 2020

Total capacity: 06 million TEU per year

- + The North: 1.2 million TEU /year:
- + The Central: 600 thousand TEU/ year; and
- + The South: 4.2 million TEU/ year

By 2030

Total capacity: 14.2 million TEU per year

- + The North: 3.5 million TEU /year:
- + The Central: 1.9 million TEU/ year; and
- + The South: 8.8 million TEU/ year

II. ICD Development Master Plan

No.	Name	Area to 2020 (ha)	Area to 2030 (ha)	Capacity to 2030 (1,000TE U/year)
I.	North: 05 ICDs	110-160	320	3.580
1	Coastal economic areas	20 - 30	60	630
2	Hanoi - Lao Cai Economic Corridor	20 - 30	70	720
3	Hanoi – Lang Son Economic Corridor	20 - 30	50	550
4	Hanoi Northwest Economic Region	10 - 20	40	380
5	Hanoi Southeast Economic Region	40 - 50	100	1.300
II.	Central - Highland: 05 ICD	70-120	200	1.900
1	Nghi Son Economic Zone	10 - 20	30	260
2	Economic Corridor road No.8 and 12A	10 - 20	30	330
3	Economic Corridor road No.9	10 - 20	30	280



4	Da Nang - Hue Economic Area, corridor 14B	20 – 30	60	550
5	Economic Corridor road No.19	20 - 30	50	480
III	South: 03 ICDs	260 - 270	650	8.800
1	HCM Northeast Economic Region	150	400	6.000
2	HCM Southwest Economic Region	70	150	1.700
3	Mekong Delta Economic Region	40 - 50	100	1.100
	Total	440-550	1.170	14.280



III. ICD Development Master Plan

Requirements for ICD establishment

Legal basic: Decision No. 47/2014/QĐ-TTg Promulgating the statutory code on the management of inland clearance depots

Requirements:

- Regional demand of exported /imported good by container over 50.000 TEU per year; or
- Region of transit port for the shipping of cargos, or where traffic congestions frequently occur due to a great flood of cargo transports (more than 30.000 TEU/year);
- Conform to the approved planning for inland clearance depot networks;
- Stay connected with the main transport corridor and the seaports;
- Provide at least 2 modes of transportation;
- Have adequate land to meet the demand for long-term growth;
- Meet with requirements of security and environment protection.



III. Draft of ICD Development Detailed Plan

July 2016, the Ministry of Transport has proposed to adjust the ICD Development Master plan and new draft of ICD Development Detailed Plan, based on the Decision No. 2223 / QD-TTg of the Prime Minister, but have some changes in the number of ICDs for the North and the South (only increase the ICDs number, but keep constant the total construction areas and capacity as planned).

The new draft of ICD Development Detailed Plan has been submitted to the Government for consideration and approval

Reasons:

- The closure of existing ports, while the new port under construction would cause difficulties in the transport of goods.
- Difficult to acquire some very big land areas with good conditions of transportation connection.
- Over concentrated ICD while poor development of connecting transportation system (railways, roads, inland waterway ports...) would cause traffic overloaded.

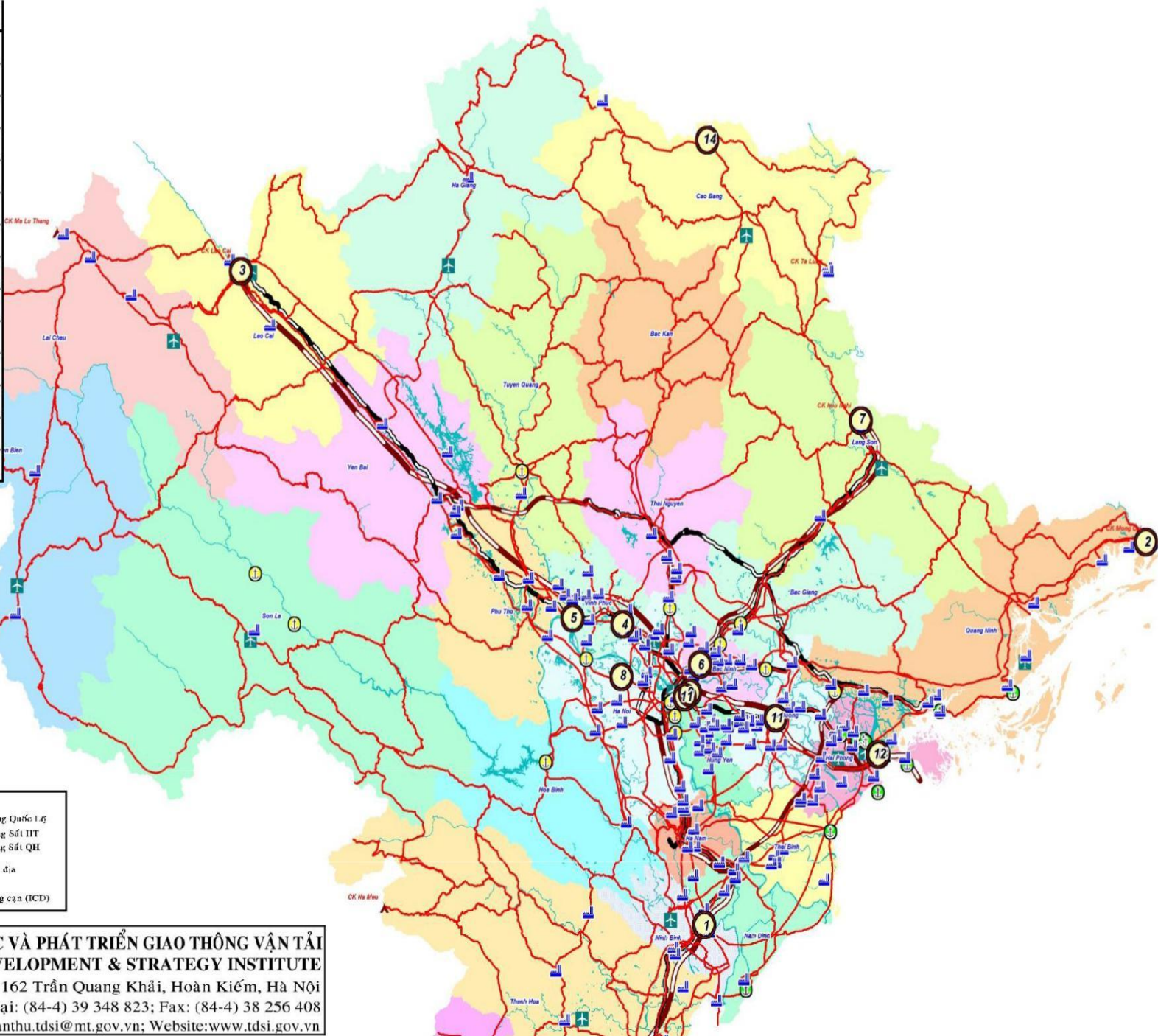
STT	Tên vị trí
1	Phúc Lộc
2	Móng Cái
3	Lào Cai
4	Hương Canh
5	Hải Linh
6	Tiên Sơn
7	Lạng Sơn
8	Hoài Đức
9	Phù Đổng
10	Cô Bì
11	Hải Dương
12	Tân cảng Hải Phòng
13	Quảng Bình
14	Cao Bằng

Chữ thích	
	Sân bay
	Cảng biển
	KCN, KCS, KKT
	Đường Quốc lộ
	Đường sắt IIT
	Đường sắt QH
	Bến thủy nội địa
	Vị trí QH cảng cạn (ICD)



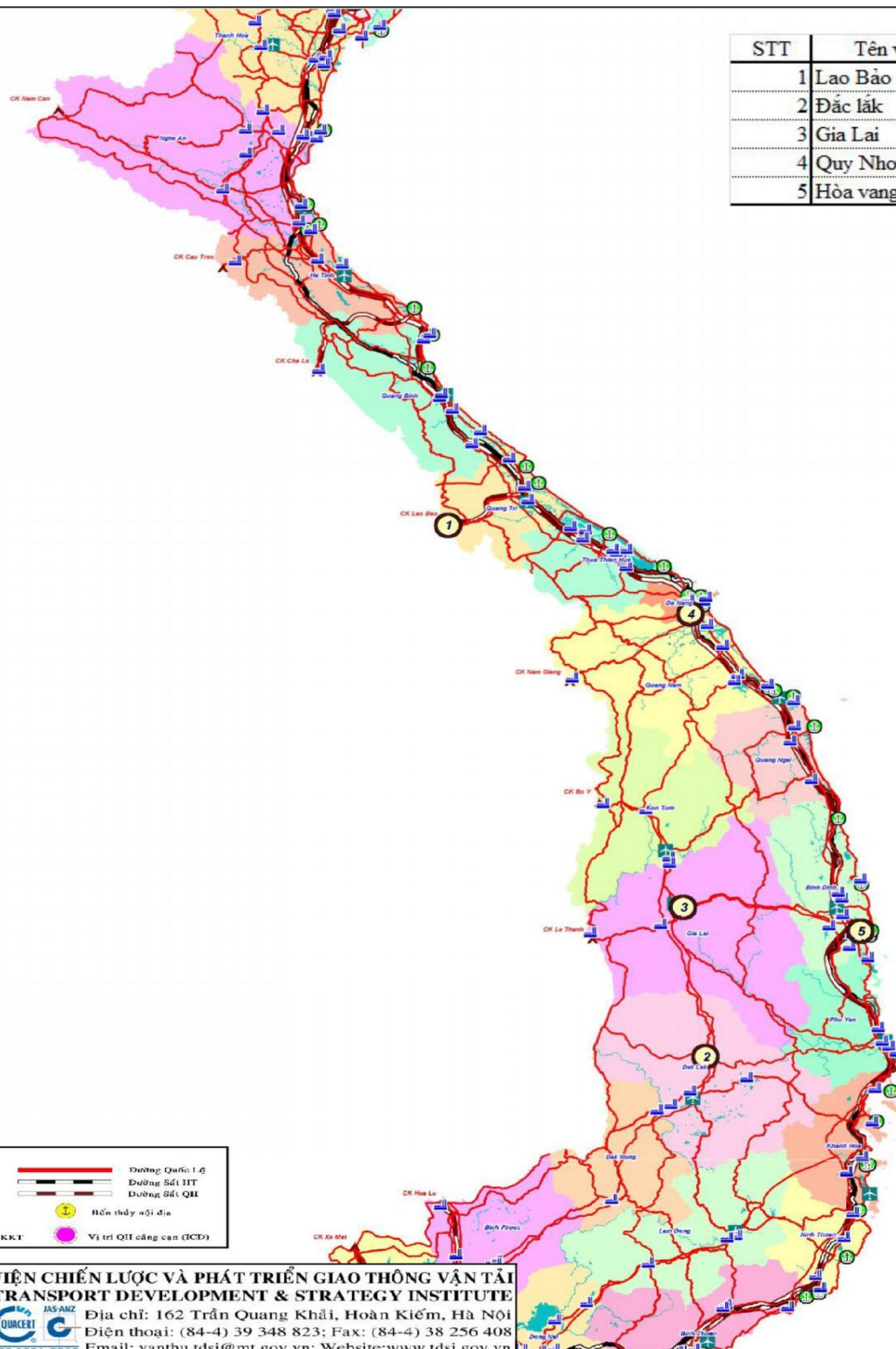
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List of ICDs in the North

No	ICD	Area(ha)		Capacity (Teu/year)	
		2020	2030	2020	2030
I	Coastal economic areas			200	650
1	ICD Phuc Loc, Ninh Binh (old)	35	35	50	150
2	ICD Mong Cai, Quang Ninh (old)	20	40	100	400
II	Hanoi - Lao Cai Economic Corridor			270	750
3	ICD Lao Cai (old)	15	25	150	300
4	ICD Huong Canh, Vinh Phuc (new)	20	50	100	400
5	ICD Hai Linh, Phu Tho (old)	5	10	20	50
III	Hanoi – Lang Son Economic Corridor			350	650
6	ICD Tien Son (old)	30	40	300	500
7	ICD Lang Son (new)	10	15	50	150
IV	Hanoi Northwest Economic Region			100	250
8	ICD Hoai Duc (old)	20	20	100	250
V	Hanoi Southeast Economic Region			700	1800
9	ICD Phu Dong (new)	10	20	100	250
10	ICD Co Bi (new)	20	50	300	500
11	ICD Hai Duong (old)	15	20	150	250
12	ICD Dinh Vu, Hai Phong	20	30	200	500
13	ICD Quang Binh, Hai Phong	26	26	150	300
VI	Cao Bang Boder-gate Area (new)	10	15	40	100
14	ICD Cao Bang border-gate	10	15	40	100
Total		236	375	1.810	4.100



STT	Tên vị trí
1	Lao Bảo
2	Đặc Lắc
3	Gia Lai
4	Quy Nhơn
5	Hòa Vang

Chữ thích	
	Sân bay
	Cảng biển
	KCN, KCS, KKT
	Đường Quốc lộ
	Đường sắt (HT)
	Đường biển (QH)
	Hồ thủy nội địa
	Vị trí QIT cảng cạn (ICD)

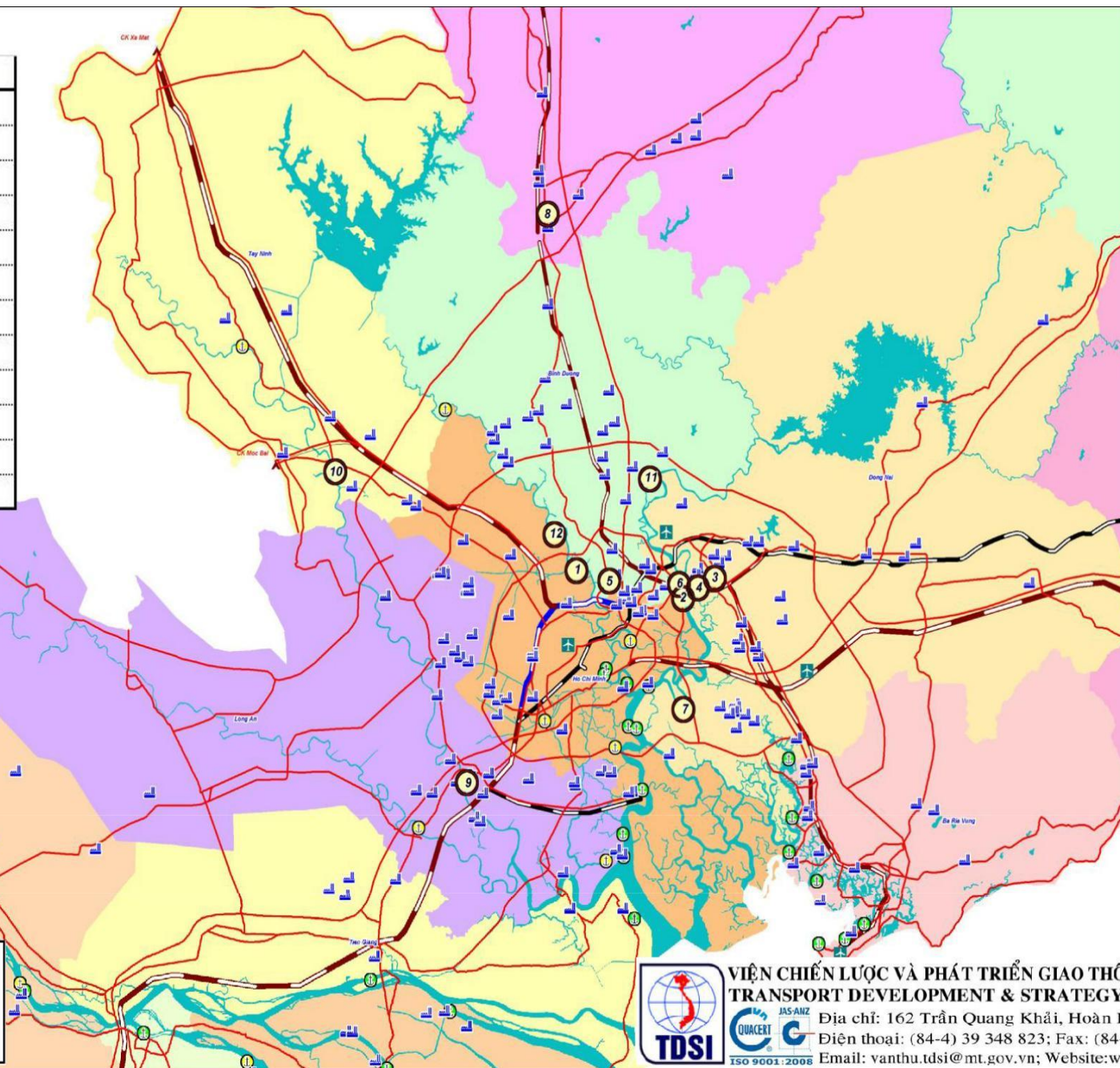
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List of ICDs in the Central

		Area (ha)		Capacity (Teu/year)	
No.	ICD	2020	2030	2020	2030
I	No.9 Road Corridor				
1	ICD Lao Bao Border-Gate	5	10	50	100
II	Road 29 Economic Corridor				
2	ICD Dak Lak	5	15	50	150
	Road 19 Economic Corridor				
3	ICD Gia Lai	5	15	50	150
4	ICD Quy Nhon	10	20	100	300
III	Nghi Son Economic Zone				
	Not yet defined				
IV	Da Nang – Hue Economic Region				
5	ICD Hoa Vang	10	20	70	200
	Total	35	80	320	900

STT	Tên vị trí
1	An Sơn
2	Long Bình
3	Tân cảng Long Bình
4	Tin Nghĩa
5	Tân cảng Sóng Thần
6	TBS Tân Vạn
7	Tân cảng Nhơn Trạch
8	Chơn Thành
9	Bến Lức
10	Thanh Phước
11	Tân Uyên
12	Củ Chi

Chữ thích	
	Sân bay
	Cảng biển
	KCN, KCS, KKT
	Đường Quốc lộ
	Đường Sắt IIT
	Đường Sắt QH
	Hố thủy nội địa
	Vị trí QH cảng cạn (ICD)



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List of ICDs in the South

No.	ICD	Area (ha)		Capacity (Teu/year)	
		2020	2030	2020	2030
I	HCM Northeast Economic Region			3.910	9.500
1	ICD An Son	20	33	300	600
2	ICD Long Binh	50	150	750	2.500
3	ICD Tan Cang Long Binh	50	150	750	2.500
4	ICD Tin Nghia	20	25	300	600
5	ICD Tan Cang Song Than	50	50	750	1.000
6	ICD TBS Tan Vn	30	50	450	1.000
7	ICD Tan Cang Nhon Trach	11	15	160	450
8	ICD Chon Thanh	10	18	150	350
9	ICD Tan Uyen	10	10	150	250
10	ICD Dong Nam Cu Chi	10	10	150	250
II	HCM Southwest Economic Region			550	1.500
11	ICD Ben Luc, Long An	20	50	300	1.000
12	ICD Thanh Phuoc Go Dau, Tay Ninh	20	30	250	500
III	Mekong Delta Economic Region				
13	Existing Logistic Centre	20	50	250	700
	Total	320	640	4.460	11.000



IV. Challenges for development and Opportunities for investment

1. Challenges for development

- Almost of ICDs are small capacity and inefficient operation, so it does not meet requirement of economic development of Viet Nam
- The transportation system, especially national railway system is slowly developed.
- Limited fund of domestic investors;
- Lack of modern equipment, poor skills of management.... [Rail](#)
- ICDs' services have not met current logistics demand.



2. Opportunities for investment

- **More opportunities for developer:** Construction area increases via some new ICDs start its construction and some existing ICDs require for upgrade and expansion

- **Better conditions for operator:** Demand for container transport rises with high and stable growth rate (approximately 15% in the period 2010-2020 and 12% in the period 2020-2030).

- **More attractive investment environment:** The Government of Viet Nam issues more open policies and provides more incentives for infrastructure development projects, including the construction of ICDs on the basis of the mutual benefit for both the State of Vietnam and foreign investors

- **Better connections for ICDs operation:** The Government of Vietnam is focusing on the development of synchronous infrastructure network, including other relevant transport systems: railways, road, airline, inland waterways and sea ports, making a better connection and facilitating the operation of ICDs.



Source of Information:

1. Decision 2223 / QD-TTg dated 13 December, 2011 of the Prime Minister approving the Master Plan on Development of Vietnam's System of Inland Clearance depots to 2020 and a vision to 2030.

2. Decision No. 47/2014/QD-TTg dated 27 August, 2014 of the Prime Minister Promulgating the statutory code on the management of inland clearance depots

3. Decision No. 1037/QD-TTg dated 24 June, 2014 of the Prime Minister on approval of revised master plan of Vietnam port system to 2020, a vision to 2030

4. Draft of Detailed Development Plan for Vietnam Inland Clearance Depot Systems to 2020, a Vision to 2030 (July, 2016) prepared by Transport Development and Strategy Institute, Ministry of Transport of Viet Nam.



THANK YOU FOR YOUR LISTENING!