

Cambodia Infrastructure Report Q2 2012

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Abstracts

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BMI View: Our robust outlook for Cambodia's construction sector in 2011 appears well-founded, with the number of approved projects in the sector still growing at a rapid pace. Going into 2012, we have seen trends in inflation and tourist arrivals move in favour for the construction sector, but we believe that a weakening global economy and the lack of reconstruction following the mid-August floods in Cambodia would outweigh these upside risks. As such, we continue to pencil in a slowdown in construction activity in 2012, with real growth for the sector forecast to slow to 6.4% in 2012.

Key developments contributing to forecasts include:

In December 2011, a railway line from Phnom Penh, running across the Cambodia-Thailand border crossing at Poipet, is scheduled to be completed in 2013. The completion date was agreed by the representatives of Cambodia and Thailand during the 32nd ASEAN Senior Transport Officials Meeting on December 12 2011. Thailand is set to sign the project, according to Vasim Sorya, the Director General of Administration at the Ministry of Public Works and Transportation. Thailand requires only 6km of rail and a bridge to complete the line, while Cambodia's 388km North Line requires 48km of track between Sisophon and the Poipet border crossing, Sorya added. In addition, the North Line requires rehabilitation work over a 338km area between Phnom Penh and Sisophon.

In January 2012, Queenco announced plans to start constructing in 2013 a 2,000-room hotel and casino resort and condominium complex in Sihanoukville, which will include a shopping mall, convention centre, spa and restaurants.

In February 2012, Thai state-linked power producer Ratchaburi Electricity Generating Holding had completed a feasibility study for the construction of a 1,800-megawatt (MW) coal power plant in the province of Koh Kong. The company is set to carry out an environmental impact assessment study for the project after receiving support from Cambodian Prime Minister Hun Sen, according to Hun Sen's personal assistant, Eang Sophalleth (cited by the Phnom Penh Post). Sophalleth also added that the electricity generated from the power plant would be sold to Cambodia at a 'special tariff' rate, with the remainder sold to Thailand. If completed, the Koh Kong project would be the largest power plant in Cambodia.

Cambodia's business environment has a long way to go before it can compete with its regional neighbours, let alone developed countries. There are several major factors holding the country back, not least the poor state of existing infrastructure and regulation. Furthermore, a haphazard financial landscape and widespread corruption impinge on future growth rates.

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