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Development orientation for Vietnamese ports in the new century

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Abstract

Currently, the whole country has 281 ports with a total capacity of over 550 million tons / year. Seaport system is invested synchronously in infrastructure: wharves, buoys, loading and unloading equipment, basic development complete, fully functional, large scale and widely distributed by region. Domain. Most seaports make full use of natural conditions, meet the requirements of transporting goods by sea, actively serving the socio-economic development process of coastal areas and the whole country, create motivations to attract and promote related industries and industries. Seaports are owned and operated directly by state-owned enterprises and other economic sectors. 4 ports are invested with state budget and assigned Vietnam Maritime Administration to represent the state agencies signing the lease contract, including: Cai Lan port, Cai Mep ODA container terminal, total port. The international market of Thi Vai and An Thoi - Kien Giang port has brought about remarkable results. Thanks to strong innovation, in the first 6 months of 2019, the volume of goods through Vietnam's seaport system is estimated at 308.8 million tons (excluding the volume of unloaded transit goods), an increase of 13% compared to with the same period in 2018. Exported goods reached 74.8 million tons, up 8% over the same period in 2018, imported goods reached 98.1 million tons, up 19%, domestic goods reached 134.9 million tons, up 11%. Passenger through the port reached 3.8 million passengers, up 32%...

Keywords: port, development orientation, logistics

1. Introduction

Currently, the connection of major seaports in the world uses large modes of transport such as railways and highways. However, the Vietnamese seaport system has only Hai Phong port connected to the railway (Cai Lan port has invested but has not been able to operate due to lack of synchronous gauge), and there is no separate highway for transportation. Loading goods. Traffic connecting waterways is limited by the static of bridges crossing the river. Therefore, the efficiency in transporting goods to the seaport has not been optimized in terms of time and transportation costs. Therefore, a problem posed is the need to link the seaport with multimodal transport for the port system to develop sustainably, logistics costs are pulled down. The Vietnam Maritime Administration is continuing to research the development of a dry port system - the extended arm of a seaport to both support port services and to contribute to the efficient organization of the transport network. The Department also noted that the planning must also spend the appropriate land fund behind the port to build a distribution center for goods and services after the port, convenient connection with the national transportation network. In the coming time, the Vietnam Maritime Administration will propose to deploy new points in the port development plan, including the viewpoint: "Ship size as planned" to serve as a basis for investment in infrastructure construction. Public ports, only allow vessels with specifications suitable to the receiving capacity of the wharf, technical standards of the channel, ensuring safety and quality of exploitation at seaports. Planning on development of Vietnam's seaport system to 2020, with orientations to 2030 divided into 6 groups of seaports with 45 active seaports of which: 2 seaports of type IA (international gateway port); 12 ports of type I (regional general port of port); 18 ports of type II (local general ports) and 13 ports of type III (offshore oil ports). Seaport type I includes: Port of Quang Ninh, Nghi Son (Thanh Hoa), Nghe An, Ha Tinh,

Thua Thien Hue, Da Nang, Dung Quat (Quang Ngai), Quy Nhon (Binh Dinh), Khanh Hoa (delivery orientation) The development is an international transshipment port - type IA), ports of Ho Chi Minh City, Dong Nai and Can Tho. The ports are capable of receiving ships with a tonnage of 10,000 - 50,000 tons, acting as the regional focal point. The container port of the world has shrunk by about 10 percent to 457.3 million TEUs in 2009. In particular, Chinese ports account for 23.3 percent of the total number of container ports in the world. According to UNCTAD's figures between 2004 and 2010, the ranking of underdeveloped countries only improved at one point. The average weight of underdeveloped countries in 2010 was 111, while for developing countries 78 and developed countries was 64. In addition, freight by road also increased by 7.8% in the period 2004-2008. Since 1990, due to the growing demand for containerized cargo, the container has also been launched and developed seven times, most recently since 2009, the capacity of the container fleet has increased by 7. Million DWT is equivalent to 5.6%, but due to the economic downturn at that time, we are now facing the overcapacity of many container vessels at ports, Load cargo flowed through the port. In 2008, however, ports in the world also increased significantly with a 4.5% increase to

reach 508.4 million TEUs. In short, compared to 2008, 2009 was reduced to 10% of total tonnage throughput and 465.7 million TEUs. Traditional ports are understood to be primarily ports because they are considered as the gateway to which any export or import must go. However, in terms of development, the port also functions transshipped. Ports situation in Europe and North America: In 1996, total cargo throughput of European ports was 894 million tons compared with 847 million tons in 1992. The cargo throughput of these ports increased year on year. 1995 was 0.6%. The slowdown is due to the decline in regional imports. Europe's ports are mainly concentrated in the northern seaports. Total cargo volume of Rotterdam, Antwerp and Hamburg was about 461 million in 1996 and in 1998 this was even larger as Antwerp ports increased their cargo volume to 120 million tons in 1998. Container and This mainly led to the growth of these ports. Most of the main cargoes of the three major ports are containerized. In 1996 the containerized rates of ports were Hamburg - 84.2%, Rotterdam -57.8% and Antwerp-56.8%. However, the bulk of the output determines the level of output of the port. In 1996, bulk cargo accounted for 65% of the port's principal cargo. North Asia ports have very low cargo volumes.

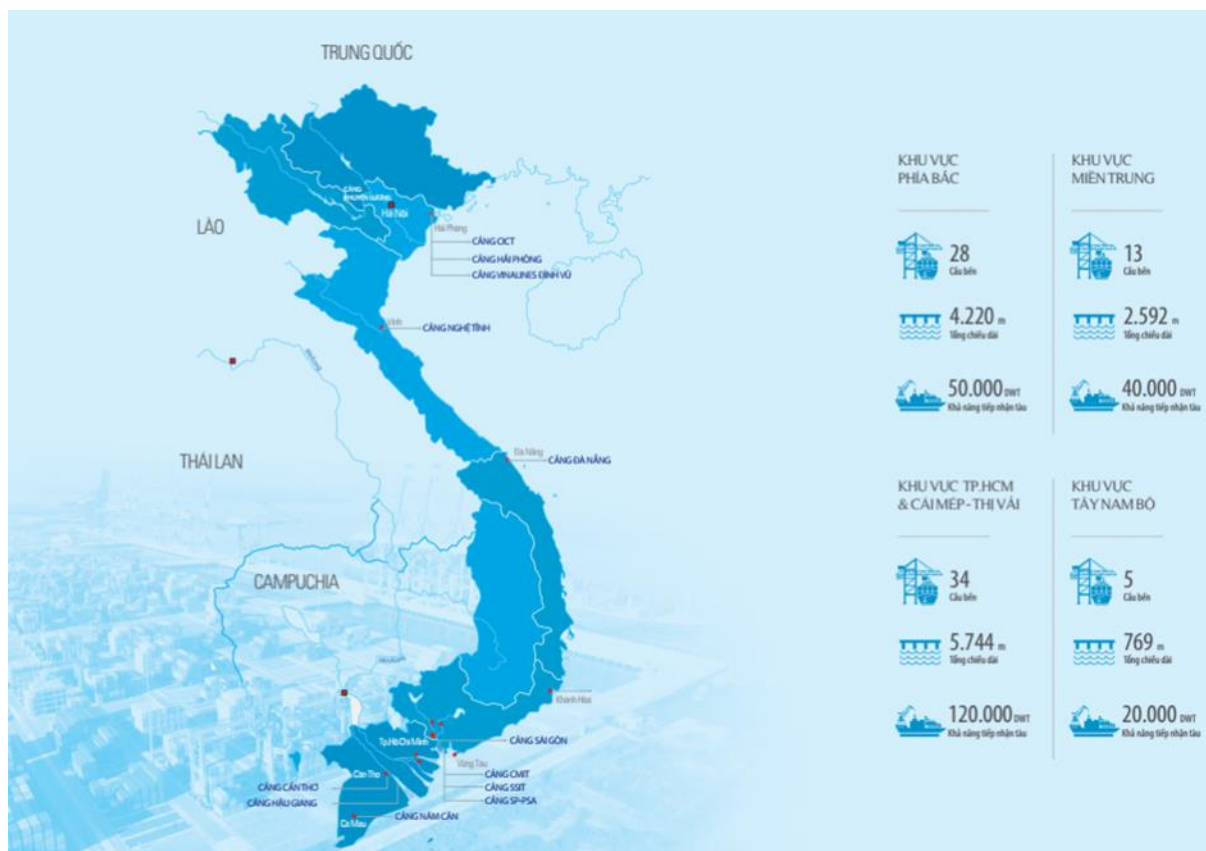


Fig. 1 The port system in Vietnam

According to ICY 1999 statistics, the total volume of containers of world ports reached 164 million TEUs in 1997, compared to 151 million TEUs in 1996. US, China, Singapore and Japan ports handled 47-48 Total container of the world. In the period 1991-1997, the average growth rate of container volume was 8.2%. Of these, 15 from Asia and 11 from Asia. The growth of these countries in the period prior to July 1997 was the main reason for that growth. This trend is likely to remain in the future as containerized

cargo rates in countries such as China, Indonesia and Vietnam are rising. In 1995, 46% of container shipments were concentrated in Asian ports, 22.6% in Europe and 15.7% in the Americas. Port cargo volumes, especially major container ports including container containers and container transshipment, also increased rapidly. Transshipment container rates can be as high as 20% and will increase in parallel with the trend of containerized shipping by large vessels and only turning on container

handling of some major ports, then transferring containers to feeders and continue shipping. The volume of containers transported in the region, especially occupies an important position for Asian and European ports. The reason is mainly due to the intensity of trade in the area and the enormous volume of transshipment containers. Along with the process of international economic integration, the volume of goods transhipped through Vietnamese ports has increased by 10% / year. However, poorly equipped port facilities and inland transport systems have hindered the increase in port clearance capacity and increased logistics costs. In fact, Vietnam has geopolitical advantages as a gateway to connect Asian economies such as Korea, Japan, China, Taiwan with neighboring countries Laos, Cambodia and Thailand. Customs clearance cargo at the Vietnamese seaport system has increased rapidly from 49 million tons in 1997 to 196.6 million tons in 2008 and 254 million tons in 2010. Of which, nearly 69.2% of the volume in 2008 was goods. Abroad, 21.8% were domestic, 9% were in transit. This impressive growth reflects the high economic growth that Vietnam has achieved since the implementation of the renovation.

2. Vietnamese port system

Because Vietnam's ports have shallow water levels, especially the northern ports. Some ports without this restriction, such as Da Nang, are located far away from the shipping centers, requiring the use of small vessels, which are not economically viable for the rapidly increasing volume of transport throughout the country. Because of the poor handling facilities, large ships are difficult to access, and will instead dock at ports of Singapore, Malaysia or Taiwan. As a result, Vietnamese ports are only serving transshipment vessels, wasting geopolitical advantages. On the other hand, lack of connectivity is also a big problem of Vietnam's seaport system. Specifically, the lack of connection between the seaport system and other technical infrastructure systems such as transportation, electricity, water ... Lack of connection with the national network connecting seaports and centers of logistics systems, between port development with industrial parks and urban areas. In addition, the role of each port in Vietnam's seaport system is not clearly defined, lacking in focus and focus, creating a sense of feeling that Vietnam has too many high-quality seaports. Actual implementation of this plan faces many difficulties. One of them is due to the young economy of Vietnam facing the problem of ensuring large financial resources for port construction. The government does not have enough financial resources while attracting foreign investment and private investment is not easy because of low cargo flow. Meanwhile, specific strategies to mobilize foreign investment for seaport development have not been developed recently. According to PPP regulations, the government budget for a PPP project must be less than 30% of the total project investment. In the private sector capital, the equity of the investor must be greater or equal to 30%. The remaining 70% can be mobilized from commercial sources. In this regard, Vietnam currently lacks modern ports, while the planning vision in this area is too short, not suitable with the general trend of the world. In fact, many new plans have been built out of date. While maritime and aviation both make money, are commercial activities, can attract investment from the private sector, they do not have specific policies but instead

just use budget money to invest. , wasteful and inefficient Vietnam is a coastal country with over 3200 km of coastline, which has many advantages for developing marine economy. The Party and State have given much priority to the development of the marine economy and are reflected in the Document of the IX National Congress. Regarding the orientation of marine economic development in the market economy, the document clearly states: "... Improving the quality, increasing the volume and safety of transportation of passengers and goods on all kinds of goods. Transport ... Increasing the market share of international transport by air, sea ..., the volume of goods circulation increased from 9-10% per year, passenger rotation increased from 5-6% male...". On infrastructure development: "... To complete the renovation, upgrading, expansion or new construction under the planning of Cai Lan, Hai Phong, Nghi Son, Cua Bac, Tien Sa, Dung Quat and Lien Chieu ports. , Chan May, Quy Nhon, Nha Trang, Thi Vai, Can Tho. On October 12, 1999, the Prime Minister approved the "master plan for the development of Vietnam's seaport system up to 2010" by Decision No. 202/1999 / QD-TTg, of which 114 seaports of all kinds Water is divided into 8 groups: Northern Port Group, North Central Port Group, Central Central Port Group, South Central Port Group, Ho Chi Minh City - Dong Nai - Vung Tau Port. And the West Island Port Group. Ports included in the master plan include 10 national general ports, 35 general ports, 69 specialized ports. Decision No. 885/QĐ-TTg dated 12/8/2004, 2619/QĐ/BGTVT dated 8 September 2003, 1022/QĐ-TTg dated 26 September 2005, 861/QĐ-TTg dated 6 September 2003, 4/2004, 791/QĐ-TTg dated 12/8/2005, 1024/QĐ-TTg dated 27/9/2005, 306/QĐ/BGTVT dated 16/2/2004 on approving detailed master plan of port groups By 2010, the Decision No. 202 of the Prime Minister was concretized. The planning of Vietnam's seaport system, in addition to its strategic orientation for the country's economic development and for the maritime sector, is also a direct indicator of port development in a subjective and investment way. Rampant wastes resources of society. Through planning and serving the regional economic development strategy that the Party and State have pointed out, these are the three key economic areas. The northern key economic area is concentrated in the triangle Hanoi - Hai Phong - Quang Ninh. The southern key economic areas are Ho Chi Minh City, Dong Nai and Ba Ria - Vung Tau provinces. The central economic zone is concentrated mainly in Da Nang and Dung Quat industrial zones. In order to meet the economic development of each region as set by the Government, the seaport system is planned on the basis of serving the economic development strategy of each region, namely the development of the northern port complex, Southern port cluster and Central port cluster. In each area, focus on master planning, development of specialized ports suitable to economic characteristics as well as natural conditions in each region. Most of the major ports are deep in the land, far away from buoy 0. Saigon is 90 Km, Hai Phong is 36 Km, Can Tho is 110 Km far from the buoy 0. The depth of the access channel to ports is mostly restricted and heavily burdened, such as Haiphong port with a depth of only 4.5 meters and Saigon port reaching 8.5 meters. The cost of maintenance, dredging is extremely expensive, some ports are at risk of being unusable. Vietnamese ports are unevenly distributed. On the one hand, due to natural

conditions, the North and the South have developed economically but few ports. Central economic development is less developed, but the number of ports is two to three times higher for both the North and the South due to the natural conditions in this area is quite conducive to the construction of the port. On the other hand, due to the unplanned and unplanned port planning, there has been a spontaneous development of port construction in the localities and branches.

Hai Phong port: Hai Phong port is in Hai Phong city, on the right bank of the Cam River. The port is located 36 km from the buoy "0". Hai Phong Port is a general port of 2,366 m located on the right bank of the Cam River in Hai Phong city. According to the designed capacity of 5 million tons per year, the actual capacity of the port now exceeds the design and other port forecasting data. The access to the harbor reaches a depth of 8.4 m allowing 10,000 DWT vessels to enter and exit. Hai Phong port is divided into 4 main areas: Main port, Vat Cach port, Doan Xa port and Chua port. In addition, Hai Phong port also has Tra Bau, Hon Gai, Hon Mot and Bach Dang transshipment areas for ships of 20,000 DWT or more. The main port area was established in 1876, which is the center of the port located in the center of the city, 7 km far away from the port. Over the past several years the main port has taken on a large volume of cargo accounting for 60% of all cargo through the port. The main port consists of 11 berths (1,722 m) belonging to the Hoang Dieu Loading and Unloading Enterprise. Chua Ve port area was built in 1965, located downstream of Cam river, 4 km from the main port. This is the second focus port and the largest container terminal in the North. Vien Cach Port is located upstream of Cam river, 7 km far from the center of the city in Do Dau ward. Vien Cach Port was built in 1974, consists of 3 terminals, 314 m long, specializing in loading and unloading of steel, bulk goods, department. At present, the port is heavily sedimented, with a depth of only 3 m, allowing barges and ships of less than 1,500 DWT to enter the port. Doan Xa Port is located between the main port and Chua Ve port. This is generally a small port, mainly used for small tonnage vessels. Port facilities are also backward, low throughput.

Cai Lan port: Cai Lan port is located in Bai Chay, Ha Long City, Quang Ninh Province, 150 km east of Hanoi, 50 km southeast of Haiphong. The port is located on Bai Chay Bay with a total area of 33 km², at the Luc entrance, 2 km southeast of the port. The population center in Bai Chay and Ha Long City is opposite the Luc Gate. The tourist and social center is located around Ha Long Bay. The industrial centers are located in the North and North West ports, namely the Gieng Day area, the B12 petroleum depot, industrial parks and shipyards. To connect Cai Lan port area with domestic economic zones via national highway 18 which has been upgraded and upgraded up to highway standards. In the master plan for port development approved by the Prime Minister, Cai Lan port will be developed into an integrated port with seven piers, capable of reaching 14 million tons per year in the year. 2010 created an economic triangle of Ha Noi - Hai Phong - Quang Ninh, reducing the stress level for Hai Phong port to balance goods between two regions. Cai Lan port entrance from the entrance (Hon Sam) to wharf is about 33 km, the depth of the channel is very different, with a depth of 22.5 m, but only reach depth - 6.8 m. The width of the channel is

quite favorable, the narrowest crossing of Bai Chay Bridge is 80 m wide.

Apart from national general ports, there are also some specialized ports in the north, mainly loading and unloading of containers, bulk cargoes and liquefied goods such as Cua Ong, Cam Pha loading and unloading stations, B12 port specializing in petroleum transport for the northern region, Dinh Vu, Transimex. Ports in the central region. The central region, where the coast is long, natural conditions are favorable for the development of the port. Characteristics of the central coast is deep sea, Short River is quite favorable for the development of deep water port. Central ports can be divided into the following three basic groups: The national port includes ports of Nghi Son (Thanh Hoa), Cua Lo (Nghe An) and Vung Ang (Ha Tinh). The general characteristics of these ports are small scale, the condition of inlet and outlet channels is not favorable except Vung Ang seaport with depth of canal - 8 m convenient for vessels with less than 40,000 DWT. Central Vietnam ports, including ports from Quang Binh to Quang Ngai. Most of the ports here are small, except for Danang. Portability of these ports is less than 1 million tons per year. In order to focus on developing and developing focal points to serve the economic development strategy in the Central of Central Vietnam, in the Master Plan approved by the Government, the Da Nang port will be expanded and expanded. Da Nang currently has 1705 m of piers, relatively good (-10 m) canal depths, which can allow vessels of up to 25,000 DWT to enter the port. The port area is less prone to current conditions, so maintenance of the port is less expensive than other ports. Danang Port currently consists of two main areas: Tien Sa and Han River. Tien Sa area consists of 4 berths 732 m long mainly loading and unloading of department stores. This area is quite ideal for container handling, but due to limited cargo, so far Tien Sa port has just stopped at the general port in combination with container handling. Han River consists of 6 berths of 973 m in length, the depth of this channel restricted (- 3.7 to 6 m) only allow ships with a tonnage of less than 5000 DWT to enter the port. Currently, this area is only used for loading and unloading cargo, for small vessels. South Central ports from Binh Dinh to Binh Thuan. This area is very potential in the construction and development of seaports. At present, this area has two major ports, Quy Nhon port and Nha Trang port. These two ports are all ports with a capacity of about 1 million tons per year. Quy Nhon port, with over 300 m of piers, depth of channel - 9.0 m, is suitable for ships under 25,000 DWT. At present, the loading and unloading capacity of the port is 1.1 million tons / year. Nha Trang harbor with 172 m of piers mainly loading and unloading of goods for consumption in the area. The condition of the access channel to the restricted port only allows vessels with a tonnage of less than 5,000 DWT to enter the port. In addition to large general ports, there are also small local ports under management and some specialized ports such as Quy Nhon petrol port, Mui Chinh petrol, Dam Mon sand port ... In particular, the Prime Minister The government has decided to plan the Van Phong deep-water port to develop into an international container transshipment port. This is a port with favorable natural conditions both in the canal, international container shipping route. The potential of Van Phong port is very large and clear. After going into research and development, it will end the current rampant

investment in port construction, develop Vietnam's maritime economic advantages and save significant capital and resources of society.

3. Conclusion

Vietnam has a total number of announced ports with 272 ports with 92.2km of wharf length, total capacity of over 550 million tons / year. Compared to 2000 - the first year of implementation of the development plan for Vietnam's seaport system, the seaport system has increased 4.4 times the length of the port. The port capacity is increasingly being upgraded and renovated to receive ships with increasingly large tonnage. Most general ports and hubs have been able to accommodate ships of up to 30,000 DWT. There are ports invested, able to accommodate the largest container ship ever (196,000 DWT) as CMIT port in Cai Mep - Thi Vai area. In 2018, Hai Phong international gateway port in Lach Huyen officially inaugurated, put into operation 2 start-up terminals, capable of receiving 100,000 DWT vessels. Along with that, for the first time in Vietnam, specialized passenger ports have been invested in Hon Gai (Quang Ninh) and Phu Quoc (Kien Giang), allowing the reception of international passenger ships with a tonnage of 225,000. GT when completed. Also in 2018, cargo throughput through Vietnam's seaport system was estimated at 524.7 million tons, of which, container throughput was estimated at 17.8 million TEU, up by 19% and 24% compared to 2017. The number of passengers through the port also increased by 28.9% compared to 2017, reaching 5.8 million passengers.

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