Industry Development Direction of Ho Chi Minh City (2022-2030)

Prepared by ATIM LAW FIRM

Date: 8 June 2023
Ho Chi Minh City has a strategic location, as the center of key economic area of the South of Vietnam, with synchronized connected infrastructure and the most developed social infrastructure in the whole country.

The geo-strategic location of Ho Chi Minh City

Economic development quadrilateral
Located in the economic development quadrilateral (HCM – Binh Duong – Dong Nai – BRVT), as the flagship of the South key economic area with strong and connected growth.

Convenient domestic traffic
Having sufficient traffic network including road, waterway and railway, being in the center of trade in the area and out to international market

Strategic location
Adjacent and conveniently connected with other economic area with distinctive material, human resources like Tay Nguyen, the South Central, the Mekong Delta.

International gateway
Having the biggest gateways in the country, international airport of Tan Son Nhat and soon Long Thanh Airport (about 30 km in Dong Nai province).

Source: Roland Berger
Especially, the national critical projects currently being constructed in the area is expected to connect Ho Chi Minh City to the world and other regions.

The connecting ability of Ho Chi Minh City to economic corridor axis.

Potential economic corridor to participate

<table>
<thead>
<tr>
<th>Nations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Economic corridor of China – Indochinese peninsula</td>
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<tr>
<td>Southern Economic Corridor (SEC)</td>
</tr>
<tr>
<td>East – West Economic Corridor (EWEC)</td>
</tr>
<tr>
<td>Economic corridor of India – Mekong Area</td>
</tr>
</tbody>
</table>

Source: ADB, BCIM, ICT Vietnam, Roland Berger
### Export Processing Zones, Industrial Zones, High-Tech Zones in Ho Chi Minh City

<table>
<thead>
<tr>
<th>Export Processing Zones</th>
<th>3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Industrial Parks</td>
<td>14</td>
</tr>
<tr>
<td>High-tech Park</td>
<td>1</td>
</tr>
<tr>
<td>Area</td>
<td>3,900 hectare</td>
</tr>
<tr>
<td>Occupied ratio</td>
<td>&gt;80%</td>
</tr>
<tr>
<td>Number of projects</td>
<td>1,674</td>
</tr>
<tr>
<td>Registered capital</td>
<td>USD 12.5 billion (foreigner-owned accounted for 45%)</td>
</tr>
<tr>
<td>Average export value</td>
<td>USD 7 billion/year</td>
</tr>
<tr>
<td>Labor quantity</td>
<td>281,000 workers, accounted for 6% the whole workers of Ho Chi Minh City</td>
</tr>
<tr>
<td>Capital amount/hectare</td>
<td>6.23 billion/hectare</td>
</tr>
</tbody>
</table>

Source: Ho Chi Minh Export Processing Zone Authority (Hepza)
Export Processing Zones, Industrial Zones in Ho Chi Minh City comparing to the Southern Key Economic region and the whole country

Table 1. Industrial zone in the whole country counted to June 2021

<table>
<thead>
<tr>
<th></th>
<th>Planned industrial zones</th>
<th>Established industrial zones</th>
<th>Operating Industrial zones</th>
<th>Planned Industrial zone area (Hectare)</th>
<th>Operating Industrial zone area (Hectare)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>560</td>
<td>395</td>
<td>288</td>
<td>210,948</td>
<td>123,020</td>
</tr>
<tr>
<td>Southern Key Economic Area</td>
<td>174</td>
<td>142</td>
<td>118</td>
<td>74,333</td>
<td>52,942</td>
</tr>
<tr>
<td>Ho Chi Minh City</td>
<td>23</td>
<td>19</td>
<td>17</td>
<td>5,921</td>
<td>4,529</td>
</tr>
<tr>
<td>Ho Chi Minh City / Total (%)</td>
<td>4.1</td>
<td>4.8</td>
<td>5.9</td>
<td>2.8</td>
<td>3.7</td>
</tr>
<tr>
<td>Ho Chi Minh City / Southern Key Economic regions (%)</td>
<td>13.2</td>
<td>13.4</td>
<td>14.4</td>
<td>8.0</td>
<td>8.6</td>
</tr>
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Source: Ministry of Planning and Investment
## Southern Key Economic region Industrial zones

<table>
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<tr>
<th>Tên tỉnh</th>
<th>Grand Total</th>
<th>Planning IZ</th>
<th>Established IZ</th>
<th>Operating IZ</th>
<th>Planning land</th>
<th>Established land</th>
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</thead>
<tbody>
<tr>
<td>Đồng Nai</td>
<td>39</td>
<td>31</td>
<td>26</td>
<td>30</td>
<td>18,873</td>
<td>10,270</td>
</tr>
<tr>
<td>Bình Dương</td>
<td>33</td>
<td>28</td>
<td>27</td>
<td>26</td>
<td>14,790</td>
<td>11,652</td>
</tr>
<tr>
<td>Long An</td>
<td>34</td>
<td>27</td>
<td>17</td>
<td>17</td>
<td>11,837</td>
<td>8,603</td>
</tr>
<tr>
<td>Bà Rịa - Vũng Tàu</td>
<td>17</td>
<td>14</td>
<td>11</td>
<td>11</td>
<td>9,505</td>
<td>8,108</td>
</tr>
<tr>
<td>Bình Phước</td>
<td>14</td>
<td>14</td>
<td>8</td>
<td>8</td>
<td>7,506</td>
<td>5,452</td>
</tr>
<tr>
<td>TP. Hồ Chí Minh</td>
<td>23</td>
<td>19</td>
<td>17</td>
<td>17</td>
<td>5,921</td>
<td>4,549</td>
</tr>
<tr>
<td>Tây Ninh</td>
<td>7</td>
<td>6</td>
<td>6</td>
<td>6</td>
<td>4,269</td>
<td>3,493</td>
</tr>
<tr>
<td>Tiền Giang</td>
<td>7</td>
<td>3</td>
<td>3</td>
<td>3</td>
<td>2,083</td>
<td>816</td>
</tr>
</tbody>
</table>

## Southern Key Economic Industrial zones structure

<table>
<thead>
<tr>
<th>Tên tỉnh</th>
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<th>Planning IZ</th>
<th>Established IZ</th>
<th>Operating IZ</th>
<th>Planning land</th>
<th>Established land</th>
</tr>
</thead>
<tbody>
<tr>
<td>Đồng Nai</td>
<td>22,41%</td>
<td>21,83%</td>
<td>25,42%</td>
<td>25,39%</td>
<td>19,40%</td>
<td></td>
</tr>
<tr>
<td>Bình Dương</td>
<td>18,97%</td>
<td>19,72%</td>
<td>22,03%</td>
<td>19,90%</td>
<td>22,01%</td>
<td></td>
</tr>
<tr>
<td>Long An</td>
<td>19,54%</td>
<td>19,01%</td>
<td>14,41%</td>
<td>15,92%</td>
<td>16,25%</td>
<td></td>
</tr>
<tr>
<td>Bà Rịa - Vũng Tàu</td>
<td>9,77%</td>
<td>9,86%</td>
<td>9,32%</td>
<td>12,18%</td>
<td>15,31%</td>
<td></td>
</tr>
<tr>
<td>Bình Phước</td>
<td>8,05%</td>
<td>9,86%</td>
<td>6,78%</td>
<td>10,10%</td>
<td>10,30%</td>
<td></td>
</tr>
<tr>
<td>TP. Hồ Chí Minh</td>
<td>13,22%</td>
<td>13,38%</td>
<td>14,41%</td>
<td>7,97%</td>
<td>8,59%</td>
<td></td>
</tr>
<tr>
<td>Tây Ninh</td>
<td>4,02%</td>
<td>4,23%</td>
<td>5,08%</td>
<td>5,74%</td>
<td>6,60%</td>
<td></td>
</tr>
<tr>
<td>Tiền Giang</td>
<td>4,02%</td>
<td>2,11%</td>
<td>2,54%</td>
<td>2,80%</td>
<td>1,54%</td>
<td></td>
</tr>
</tbody>
</table>
The manufacturing and processing industry is restructuring quickly, **4 main industries** have been clearly formed: Mechanics-machinery, Electronic-information technology, Deep processing of food, Pharmaceutical and rubber.

The shift in the structure of level 2 industries of manufacturing group

Source: Roland Berger
6 new trends in industrial manufacturing in the global and HCMC’s opportunity

1. Stable development
2. Breakthrough technological process
3. Place of production has strategic geopolitical location
4. Personalize products
5. Product identity and localization
6. Digitization and process integration

Open up many opportunities for HCMC to attract new industry investment

- Attract leading manufacturers to automate the process
- Attract investors who want to establish production base near ASEAN and China market
- Attract manufacturers with highly-flexible and modifiable tech
- Attract investors by a “balance” diplomacy policy
- Attract manufacturers of integration device

Source: Roland Berger
The selection of new industries for HCMC is suggested the 3 following Criteria:

### Criteria

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Percentage</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Market attractiveness</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Market capacity</td>
<td>15%</td>
<td>Predicted exporting industry scale until 2020</td>
</tr>
<tr>
<td>Growth</td>
<td>15%</td>
<td>Prediction of growth in exporting industries from 2020 - 2050</td>
</tr>
<tr>
<td><strong>Ability to attract investors</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Source of material</td>
<td>5%</td>
<td>Easy to approach input material without distancing problem</td>
</tr>
<tr>
<td>Generate more jobs</td>
<td>5%</td>
<td>Number of jobs generated measured by job generating ranking by industries</td>
</tr>
<tr>
<td>Room for development</td>
<td>10%</td>
<td>Room for development based on competitive background in HCMC and Southern Key Economic area</td>
</tr>
<tr>
<td>Attract the moving of investment to SEA</td>
<td>10%</td>
<td>The attractiveness of the industry when country like USA, Europe, Korea, Japan moves and expand</td>
</tr>
<tr>
<td><strong>Government priority</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Government priority</td>
<td>15%</td>
<td>Based on direction of the Government and prioritized industries of the South East region according to Resolution 24</td>
</tr>
<tr>
<td>Eco-friendly</td>
<td>10%</td>
<td>The stability in term of the environment based on Pollution index</td>
</tr>
<tr>
<td>Value added content</td>
<td>15%</td>
<td>The contribution of the industry to GRDP based on value added proportion via conversion factor VAGO</td>
</tr>
</tbody>
</table>
The selection criteria shall follow the development direction of Industry which the Resolution No. 24 and the Government policies created for the South East Region of Vietnam.

### Prioritized industries until 2025

<table>
<thead>
<tr>
<th>No.</th>
<th>Industry</th>
<th>Specifics</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Metal, machinery</td>
<td>Agriculture machineries, steel production</td>
</tr>
<tr>
<td>2</td>
<td>Cars</td>
<td>Shipbuilding, production of vehicle and accessories</td>
</tr>
<tr>
<td>3</td>
<td>Petrochemical</td>
<td>Petrochemical products and production technology</td>
</tr>
<tr>
<td>4</td>
<td>Plastic and rubber</td>
<td>Engineering plastics and rubber</td>
</tr>
<tr>
<td>5</td>
<td>Textile</td>
<td>Raw materials for garments, textile and leather product</td>
</tr>
<tr>
<td>6</td>
<td>Food and beverage</td>
<td>Processing agricultural, forestry and fishery products</td>
</tr>
<tr>
<td>7</td>
<td>Medicine</td>
<td>Pharmaceutical</td>
</tr>
<tr>
<td>8</td>
<td>Electronic</td>
<td>Communication device, electronic components</td>
</tr>
<tr>
<td>9</td>
<td>Information technology</td>
<td>Industrial software and hardware</td>
</tr>
<tr>
<td>10</td>
<td>Renewable energy</td>
<td>Atomic energy technology</td>
</tr>
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### Prioritized industries for South East Region of Vietnam

- Production of robots, new materials
- Medicine, chemical product, bioproducts
- Electronic – communication, digital product service, information security technology
- Equipment integrating automatic operation, remote control, software production technology
- Environment technology

Source: Roland Berger
As analyzed above: Along with 4 current main industries, HCMC is proposed to extend to 5 new industries and create ecosystem for 6 potential supporting services.

- **4 main current industries**
  - Electronic, information technology device
  - Pharmaceutical chemicals, rubber, plastic
  - Bio technology
  - Medical equipment
  - Automation, robotics
  - New materials
  - Deep processing of food
  - Renewable energy equipment
  - High quality medical service
  - Transportation and logistic
  - E-commerce
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  - Finance, investment banking, insurance
  - Education technology
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Model “4 + 5 + 6” shall help HCMC connect more closely with other provinces in the regions, helping create center for creative innovation, new and modern manufacturing zone.

Creative innovation center of Southern Key Economic are.
With this model, HCMC need to set up a 2 step schedule:

1. Boost the restructuring of the existing industries to enhance the production, increase technical content and move polluting, labor intensive industries out of HCMC to create new land to develop new industries.
2. Step by step creating an ecosystem, make use and boost the regions connection to attract high tech industries.

**Modernization of production**
Via Internet of Things, enhance the connection between machines and machines with censors, identifier to maintain the continual connection of machines under human monitor.

**Automation of industry**
Automate the process of separately and in production line in the end stage with
digitalization and M2M communication with coverage of the entire value chain from devices, system, solutions and services.

**4.0 Industry**
Digitalization of the whole ecosystem via robot, censor and Internet of Things – smart factory model.

**Network integrating different stages in manufacturing process**

**Comprehensive ecosystem integrating external factor including provider**

**HCMC current situation**

**Labor intensive**
Workers mainly join in manufacturing. Human need to work with machineries.
HCMC will focus on 4 new Industrial zone models, as follow:

### 1. Smart & Stable Industrial zones

**Idea:**
- Industrial zones shall promote the establishment of SMART city, aiming to stable goal via:
  - Stable area planning (for example: prioritizing open area and natural habitat).
  - Set up technologies and infrastructures for smart city (for example: censor and “internet of things” to monitor the environment).
  - Set up standard for “green” construction
  - Apply “green” technology (for examples: sponge bob city to reserve and reuse water).
- Size, scale and product provided is not unified and changed in each development stage.

**Successful development models:**
- Sino-German, China.

### 2. Integrated Industrial zones (Residency – Service – Industry)

**Idea:**
- Big scale industrial zones with factions for development purpose: residential area, commercial and other public construction.
- Usually located in area with connecting capacity via variety means (for example: near airport or suburb of big city) to help employee and visitor easily visit.
- The smart and stable idea usually integrated to the development of a town to enhance the living and working conditions.

**Successful development models:**
- IITGN, Greater Noida, India
- Memphis Aerotropolis, USA

### 3. Ecologist Industrial zones (Industry symbiosis)

**Idea:**
- Small scale Industrial zone shall be a place for company groups gathering and exploit each other’s product for a goal of stable development.
- Ecologist Industrial zone can be developed as a new investment project (greenfield) a part of a lager industry development.
- Product provided is not unified and can be changed depending on the scale and characteristic of the community.

**Successful development models:**
- National Industrial zone of Ulsan, Korea

### 4. Specialized Industrial zones

**Idea:**
- Industrial zones is directed for specific trades – usually perform the main role in promoting the new development of the industry.
- Providing Industrial zone goods and land/space/infrastructure modified for specific industry.
- Size, scale and product is not unified and can be changed depending on the development stage.
- Multi-way connection and the ability to approach town and big area is not mandatory (for example: crowded area may not be suitable to industrial zones focusing on heavy manufacturing).

**Successful development models:**
- High tech: Suzhou, China
- Restaurant and beverage: Mega Food Park, India
- High tech: NJ New Materials Park, China
- Logistic: London Gateway Park, UK
1. Regarding existing Industrial and Export Processing Zones

- In-deep transforming: ecological, high-tech industrial zone; technology renovating, advance the added value and become more eco-friendly.

- Attracting high tech industries with high capacity for spreading and have advantages in the Industrial zones to create connecting chain between industries.

- For small industrial zones surrounded by residential area: consider to convert.

- For other industrial zones: keep reserving land for industry development after the operation duration; but need to transforming in-deep for better efficiency.

2023 – 2025 duration: Set up a pilot project to convert 04 manufacturing, industrial zones, including: Tan Thuan Manufacturing zones, Tan Binh, Cat Lai and Hiep Phuoc Industrial zones according to the direction to gain experience, replication the model and schedule, solution.

2025 – 2030 duration: Set up pilot project to convert remaining manufacturing, industrial zones and starting to convert the manufacturing and industrial zones gradually.

Source: Ho Chi Minh Export Processing Zone Authority (Hepza)
2. Regarding new Industrial Zones

2.1 Industrial zones already established but not yet operating:
- Le Minh Xuan 2
- Le Minh Xuan Expansion
- Phong Phu
- Tay Bac Cu Chi Expansion
- Vinh Loc Expansion

2.2 Industrial zones already in the list of the HCMC's Industrial Park Plan but not yet established:
- Vinh Loc 3
- Hiep Phuoc 3
- Pham Van Hai I and II, area: 668 hectares (replacing three industrial zones, including Phuoc Hiep, Bau Dung, Xuan Thoi Thuong)

Source: Ho Chi Minh Export Processing Zone Authority (Hepza)
2.1 Industrial zones already established but not yet operating:

- Le Minh Xuan 2 (area: 319.77 hectares) – located at Le Minh Xuan, Binh Chanh district, *specialized in health – medicine*.

- Le Minh Xuan Expansion Industrial zone (area: 109.91 hectares) – located at Le Minh Xuan, Binh Chanh district: *has variety trade, focusing on food industry, electricity – electronic and other key industries*.


- Tay Bac Cu Chi expansion Industrial zone (area: 173.24 hectares) – located at Trung Lap Ha and Tan An Hoi, Cu Chi district: *specialized in automation mechanics* (creating a connecting chain of mechanic industry in HCMC’s northwest).

- Vinh Loc expansion (area: 56.06 hectares) – located at Vinh Loc A, Binh Chanh district: *specialized in food industry*.

*Source: Ho Chi Minh Export Processing Zone Authority (Hepza)*
 Specific developing direction for every new industrial zone

2.2 Industrial zones already in the list of the HCMC's Industrial Park Plan but not yet established:

- Vinh Loc 3 Industrial zone (area: 200 hectares) – located in Binh Chanh district: specialized in rubber and plastic industry.

- Hiep Phuoc Industrial zone – phase 3 (area: 500 hectares) – located in Nha Be district: reserving 100 hectares for logistic, 100 hectares reversed for moving enterprises from other industrial zones due to operation expiration, not in accordance with the plan or investment portfolio of HCMC; planning and reserving the remaining land (area: 100 hectares) for food industry.

- Pham Van Hai I and II Industrial zones (area 668 hectares) is high tech industrial zone, with planned faction for electricity – electronic, rubber – plastic and automation mechanics.
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