บทความวิจัย

บทบาทของประเทศไทยในฐานะประตูการค้าของกลุ่มประเทศอินโดจีนสำหรับสาธารณรัฐเกาหลี

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บทคัดย่อ

ประเทศไทยมีความได้เปรียบทางภูมิศาสตร์จากการมีตำแหน่งที่ตั้งอยู่ตรงกลางของระเบียงเศรษฐกิจเหนือ-ใต้ และตะวันออก-ตะวันตก กอปรกับโครงการพัฒนาโครงสร้างพื้นฐานด้านคมนาคมขนส่งที่สนับสนุนการบูรณาการโครงข่ายโลจิสติกส์ภายในอาเซียน โดยมีโครงการขยายท่าเรือแหลมฉบังเพื่อรองรับการเพิ่มขึ้นของอุปสงค์การขนส่งทางทะเล รวมถึงแผนการก่อสร้าง “แลนด์บริด” เชื่อมโยงฝั่งมหาสมุทรอินเดียและแปซิฟิก ที่จะช่วยเพิ่มประสิทธิภาพด้านโลจิสติกส์และการอำนวยความสะดวกทางการค้าให้แก่ประเทศไทย บทความนี้มีวัตถุประสงค์ในการศึกษาความเป็นไปได้ในการเป็นประตูโลจิสติกส์ทางการค้าระหว่างประเทศเกาหลี กับภูมิภาคจีนตอนใต้และกลุ่มประเทศอินโดจีน โดยมุ่งสำรวจเส้นทางการขนส่งและจุดเชื่อมโยงที่มีบทบาทสำคัญต่อการอำนวยความสะดวกทางการค้าภายในภูมิภาค

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RESEARCH ARTICLE

Thailand as a Gateway to Indochina for Korea Trade

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Abstract

Thailand has great advantages of her geographical location as situated at the centre of the North-South and East-West Economic Corridor. Several projects of transportation infrastructure development supporting the logistics network integration within ASEAN, have been initiated. The largest international deep-sea port of Thailand, Laem Chabang, will be expanded to cope with increasing maritime transport demands. The planned project of constructing a land bridge linking the Indian Ocean and the Pacific, can also strengthen the country in terms of logistics performance and trade facilitation. This paper aims at validating the possibility of Thailand as a major logistics gateway for Korea trade to South China and neighboring countries of Indochina. Significant linkage nodes and potential routes facilitating the trade are explored.

Keywords: Gateway, Economic Corridor, Greater Mekong Subregion, Indochina, Logistics

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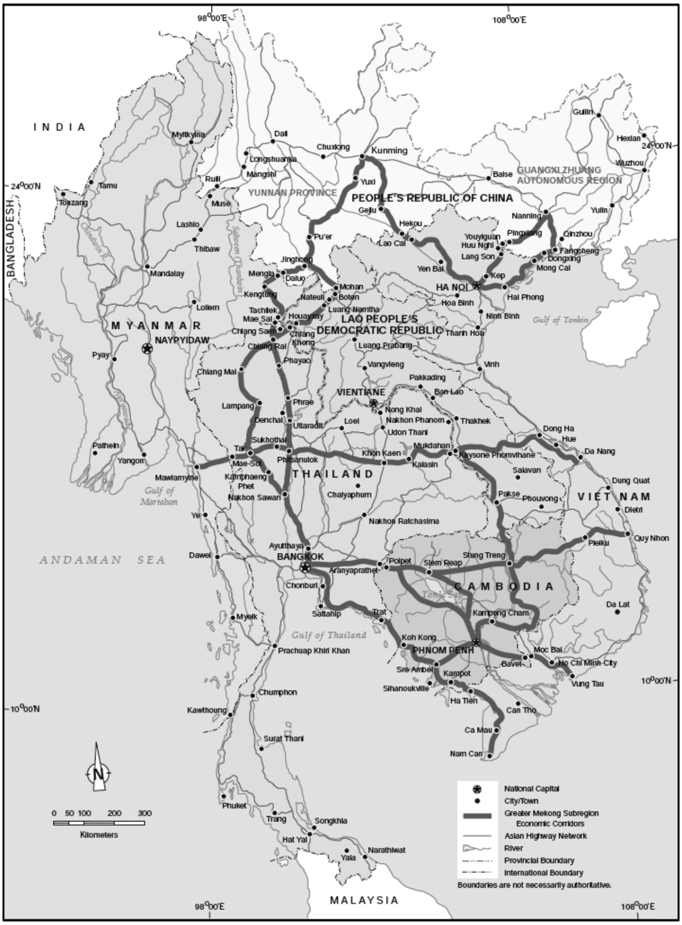
Introduction

Thailand is located at the centre of the Indochina peninsula in South East Asia and shares the borders with Myanmar and Lao People's Democratic Republic (Lao PDR) in the North, Myanmar and the Andaman Sea in the West, Lao PDR and Cambodia in the East, and the Gulf of Thailand and Malaysia in the South. The coastal land in the South of the country is surrounded by both the Gulf of Thailand and the Andaman Sea. With the development of physical connections among neighboring countries in the Greater Mekong Subregion (GMS), specifically, the North-South Economic Corridor (NSEC) and East-West Economic Corridor (EWEC), Thailand has been strengthened in terms of logistics performance and trade facilitation.

The GMS consists of Cambodia, Lao PDR, Myanmar, Thailand, and Vietnam, as well as Yunnan Province and Guangxi Zhuang Autonomous Region of the People's Republic of China. As Thailand does not share a border with China, the NSEC extends from Kunming in China to Thailand via either Myanmar-Lao PDR route or along the Mekong River. The EWEC connects four GMS countries by a 1,110-kilometre route, starting from Mawlamyine in Myanmar to Thailand, Lao PDR and Vietnam, respectively. Now, the physical infrastructure under the NSEC and EWEC is almost complete and the institutional infrastructure is expected to be in place by 2015 (Banomyong, 2008). This further provides Thailand with a fundamental of regional economic boost. Together with her strategic location, Thailand

is emerging as a major logistics hub to South China and neighboring countries of Indochina.



Source: Asian Development Bank

Fig. 1 The NSEC and EWEC

The Republic of Korea, commonly known as South Korea or simply referred to herein as Korea, is regarded as one of the Asian countries

significantly influencing ASEAN countries and several parts around the world in terms of economy, technological innovation and cultural invasion. Similar to China and Japan, Korea joins the so-called ASEAN Plus Three, which is a cooperation between ASEAN and the three East Asia countries. Trade between the Plus Three Countries and ASEAN is growing since the establishment of the forum. In 2012, the total trade of ASEAN with the Plus Three countries reached US$712 billion, a rise of 5 percent over the year before. Trade value of ASEAN's imports from the Plus Three countries in 2012 increased by 11.0 percent, while that of ASEAN's exports to the Plus Three countries dropped by 1.4 percent. ASEAN's trade with Plus Three countries equals 28.8 percent of ASEAN's total trade (Association of Southeast Asian Nations, 2014). In terms of export, ASEAN countries have been one of the most important markets to Korea. In 2012, ASEAN is the 2nd largest market of Korea's products with 14.4 percent of Korea's total export, following the People's Republic of China (24.5 percent). On the other hand, Korea imports to ASEAN amount to 10 percent of Korea's total import, which is ranked the 4th (Royal Thai Embassy, 2013).

Thailand and Korea have established bilateral relations since 1958. Both countries have become one of the major trade partners to each other for the past decade. Total trade between these two countries during 5 year period (2007-2011) fell around US$10,497.12 million per year, which constituted 3.01 percent of Thailand's total trade value. Furthermore, Korea is the 10th largest trading country of Thailand over the past 5 years, with bilateral trade value of nearly US$14 billion in 2013 (Ministry of Commerce,

2014). Most of the Thailand exports to Korea include circuit board, crude oil, sugar, steel and steel products, rubber, computer parts and chemical products. The primary exports from Korea to Thailand are electrical machinery and components, iron and steel, and chemicals (Bureau of Asian and Pacific Affairs. 2012).

Table 1 Thailand's Total Trade Value in 2013

	Country	Trade Value (million bath)	%
	Total	**14,567,086.6**	**100.0**
1	China	1,979,968.1	13.6
2	Japan	1,927,849.7	13.2
3	USA	1,141,801.9	7.8
4	Malaysia	800,144.8	5.5
5	United Arab Emirates	625,487.3	4.3
6	Singapore	590,515.0	4.1
7	Indonesia	574,543.7	3.9
8	Australia	480,876.2	3.3
9	Hong Kong	449,235.1	3.1
10	South Korea	415,297.3	2.9
11	Others	5,581,367.5	38.3

Source: Ministry of Commerce, 2014

Thailand has concluded a free trade agreement with Korea under the ASEAN-Korea free trade agreement (AKFTA) in December, 2007, providing Thailand with more flexibility in cutting or waiving tariffs in

comparison with other ASEAN nations (Department of Trade Negotiations, 2008). The establishment of a free trade area between Thailand and Korea is highly anticipated to boost trade transactions and investment as well as extend other benefits for the two parties. Therefore, supported by the advantageous location, the role of Thailand as a logistics linkage between countries of Indochina and Korea becomes a critical factor in regional trade enhancement and entails profound investigation.

Maritime Transport in Thailand

1. Background

Some 6 billion tonnes of freight moves by maritime transport each year and is estimated to comprise 45 per cent liquid bulks, 23 per cent dry bulks and 32 per cent general cargo (Mangan *et al*., 2008). Similar to most countries, Thailand's international trade relies heavily on maritime transport in terms of trade volume. It is reported that almost 90 percent of total international trade is transported through sea transport (Ministry of Transport, 2010).

To accommodate the growth of Thailand's international trade in the future, maritime transport expansion becomes critical and port system plays a vital role in the efficiency and effectiveness of importing and exporting of products. Therefore, factors such as port capacity and type of cargo handled have an impact on overall trade facilitation between countries. As more Thai businesses engage in international trade in light of the formation of Asian Economic Community (AEC) and the reduction of trade barriers

through Free Trade Agreements (FTAs), the improvements in port infrastructure and facilities will continue to be mandatory.

2. Major Seaports in Thailand

Ports are the chief facilities linking an economic system with the international market and therefore the main trade hubs. Considering international ports in ASEAN, Cambodia and Myanmar have no direct service with mainline carriers while Lao PDR is a land-locked country (Banomyong, 2012). Thus, apart from existing key players such as Singapore and Malaysia, Thailand's port system have emerged as a competitive candidate. Particularly, Thailand's ports are found to have the lowest cargo handling cost as a result of the Thai government's policies to promote the country as a regional logistics hub (Phanchaiyo and Opasanon, 2009).

There are 5 major international ports in Thailand, including Bangkok Port, Laem Chabang Port, Mabtaput Port, Sriracha Port and Songkhla Port. Of interest is that all of them are situated along the east coast of the country. Therefore, these ports can effectively accommodate the increased seaborne cargo from the East Asia and North America. A short summary of the first two largest international ports in Thailand, Bangkok Port and Laem Chabang Port, are given hereafter.

Bangkok Port

Bangkok Port was first constructed in 1938. It is located on the left side of the Chao Phraya River in Khlong Toei District, occupying over 941

acres. Specifically, 344 acres are inside the Customs fence and are utilized for operational purposes. It consists of transit sheds, warehouses, open storage areas, administration buildings and wharves. Another 51 acres are outside the customs fence, 29 acres for future expansion.

Source: http://www.chaoprayanews.com

Fig. 2 Bangkok Port

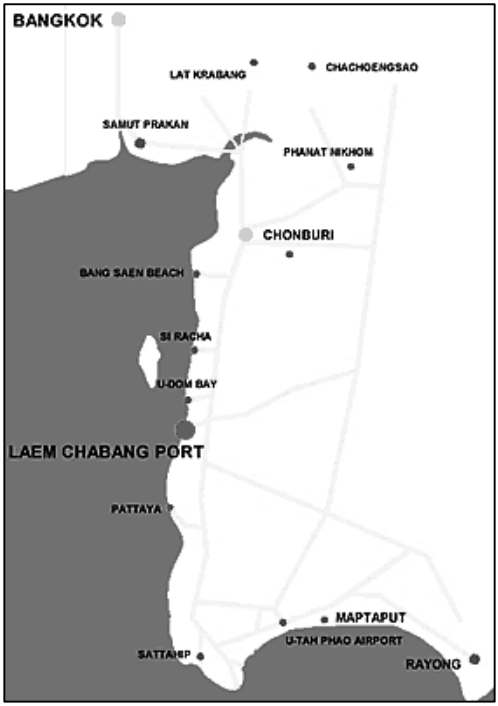
Bangkok Port is supported by the road and railway network, which effectively and efficiently accommodates the transportation of cargoes between the port and its hinterland. Currently, Bangkok Port handles over 1.5 million TEUs per year, which makes the port itself the second largest port of Thailand in terms of container traffic. The depth of the river within the port area varies from 8.5 meters to 11 meters below the mean sea level. Although Bangkok Port is equipped with hi-technology mechanical handling equipments, it cannot accommodate ships of size greater than 12,000 deadweight tonnes (DWT), length greater than 172 meters, or draught of more than 8 meters in relation to the mean sea level.

As a result of the high freight traffic and physical limitations of Bangkok Port, in 1987 the Thai government started the development of a

deep-sea port, Laem Chabang Port, to facilitate larger ships and cope with the rapidly increasing number of containers.

Laem Chabang Port

Laem Chabang Port began to officially operate in 1991 and has become the busiest international seaport in Thailand. The port is located on the Eastern shore of the upper Gulf of Thailand, approximately 110 km away in the south from Bangkok. Laem Chabang Port is one of the most advanced ports in Southeast Asia with the modern state-of-art infrastructure and hi-technology facilities to support cargoes to be transhipped to Bangkok and other areas. In order to overcome Bangkok Port's constraints, Laem Chabang Port was designed so as to be capable of handling extra-large vessels (Super Post Panamax > 10,000 TEUs). With the size of 2,572 Acres, it has sufficient supporting areas for docking operations and related activities (Laem Chabang Port, 2011).



Source: http://www.cruisecritic.com/ports/newport.cfm?ID=465

Fig. 3 Location of Laem Chabang Port

Laem Chabang Port is under the management of the Port Authority of Thailand as a landlord granting concessions to private sectors. That is, the port operational functions are given priorities to private sectors to sub-contract; granting most benefits to the users from competitive private port operators. The entire project development is composed of 3 phases.

Laem Chabang Port's Phase 1

The construction of the phase 1 focused on providing ample space for containers and capacity to accommodate larger ships that Bangkok Port was unable to serve. The first phase consists of 11 terminals, terminal A0-A5 and terminal B1-B5, comprising 5 container vessel terminals, 3 multipurpose terminals, 2 roll on/roll off (Ro/Ro) terminals, and 1 bulk cargo terminal.

Table 2 Details of Laem Chabang Port's First Phase

Structure of Port	U-shaped
Size of Port	450-metre width, 1,600-metre length
Depth of Mooring Basin	14 metres at mean sea level
Channel Depth to Terminals	16 metres at mean sea level
Breakwater Length	1,300 metres
Size of Ships	Panamax size (60,000 – 80,000 DWT, with capacity to carry more than 3,000 twenty-foot equivalent units or TEUs)
Number of Quays	11
Total Capacity for Cargo	4 million TEUs

Source: Laem Chabang Port

Laem Chabang Port's Phase 2

In 1997, Laem Chabang Port hits the target of 1 million TEUs and became Thailand's major port. Due to the first phase of Laem Chabang Port reaching its full capacity, the Thai government had to introduce the

construction of Phase 2 to cope with the increasing number of containers. The second phase adds 7 more terminals, terminal C0-C3 and terminal D1-D3, including 6 container vessel terminals and 1 Ro/Ro terminal.

Table 3 Details of Laem Chabang Port's Second Phase

Structure of Port	U-shaped
Size of Port	500-metre width, 1,800-metre length
Depth of Mooring Basin	16 metres at mean sea level
Channel Depth to Terminals	16 metres at mean sea level
Breakwater Length	1,900 metres added to the old structure combined length of 3,200 metres
Size of Ships	Post Panamax (80,000 DWT, with capacity to carry more than 5,000 TEUs)
Number of Quays	7
Total Capacity for Cargo	6.8 million TEUs

Source: Laem Chabang Port

Since the establishment in 1991, the port has grown rapidly and become the most efficient gateway to Thailand and the greater Indochina region. A transportation gateway is referred to as a port or hub serving a major region or metropolitan area (Walter and Poist, 2004). With these two phases, Laem Chabang Port has the estimated capacity of 11 million TEUs per year in total. The port reached a throughput of 5.7 million TEUs in 2011, which ranks itself as one of the world's top 20 container ports.

Laem Chabang Port's Phase 3

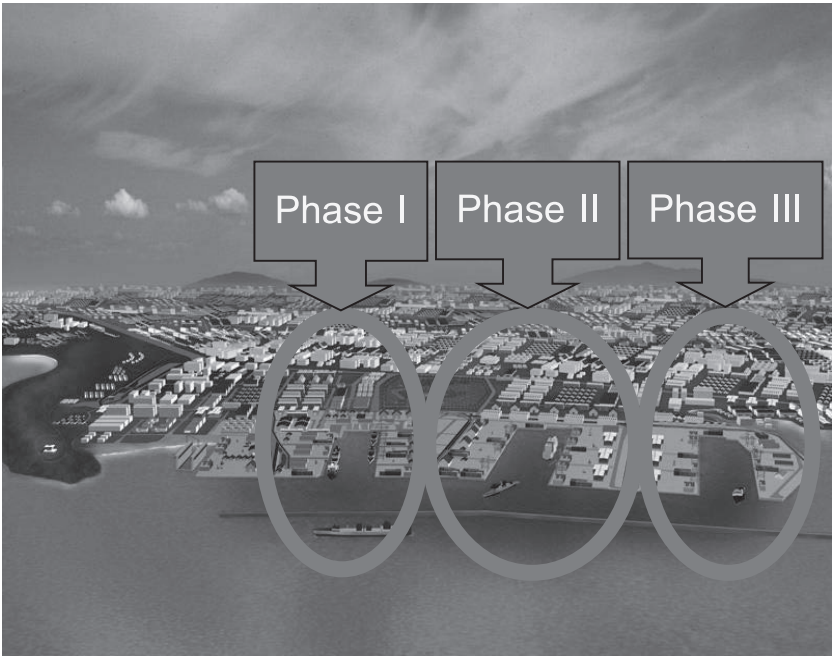
In order to enhance the port's competitiveness, continuing expansion of Laem Chabang Port is needed and expected to play a major role in the distribution of products to Asian countries. Statistically, it is reported that Laem Chabang Port will have to accommodate more than 10 million TEUs by 2016 and 16 million TEUs by 2020, far exceeding the total capacity of Phase 1 and 2 (PAT News, 2012a). Therefore, the Thai government has proposed the development of Laem Chabang Port's Phase 3 to cope with increasing demands and also to boost Thailand's opportunity to become a logistics hub for the region.

Currently, the development of the third phase is in its early stages - a feasibility study conducted by an advisory company. The Port Authority of Thailand (PAT) expects the completion of Laem Chabang Port's Phase 3 in 2017. The third phase will contain 9 terminals, including 7 container vessel terminals, 1 container/general cargo terminal, and 1 Ro/Ro terminal (Laem Chabang Port Phase 3, 2011). With this addition, Laem Chabang Port will be able to accommodate seaborne cargoes up to 18 million TEUs per year. Additionally, to support freight movement to Laem Chabang Port by rail, the Thai government has also approved construction of railways to link Laem Chabang Port to ICD Lat Krabang and Nakhon Ratchasima province.

Table 4 Details of Laem Chabang Port's Third Phase

Structure of Port	U-shaped
Size of Port	800-metre width, 2,000-metre length
Depth of Mooring Basin	18 metres at mean sea level
Channel Depth to Terminals	18 metres at mean sea level
Size of Ships	Super-Post Panamax (100,000 DWT, with capacity to carry more than 10,000 TEUs)
Number of Quays	9
Total Capacity for Cargo	8 million TEUs
Additional facilities and infrastructure (supplementing Details what the first phase offered)	- The use of clean energy such as electrical energy - Logistical innovations such as automated stacking cranes

Source: Laem Chabang Port



Source: Ministry of Transport

Fig. 4 Illustration of Laem Chabang Port's Phase 1-3

Albeit Laem Chabang Port is not located in a close proximity to major maritime routes, it could take advantage of Thailand's geographical location. That is, with the logistics infrastructure under the NSEC and EWEC, Laem Chabang Port can efficiently and effectively facilitate trade and investment between Indochina and the East Asia countries, including Korea. While Thailand still lacks major deep-sea ports on the west coast of the country, there is an expectation of constructing Pak Bara Port in Satun province and Dawei Port in Myanmar, which could directly serve cargoes

from Europe and Middle-East to Thailand or the Far-East further, and vice versa. The updates of these two projects are given hereafter.

3. Planned Port Development

Pak Bara Port

The project of Pak Bara deep-sea port will be established at Andaman sea coast in Satun province, southern Thailand. The port will have the capacity to handle up to 800,000 TEUs per year and be able to serve 70,000 DWT vessels. When the project is completed, Pak Bara will be the first deep-sea port of the west southern coast of Thailand.

To strengthen Thailand's logistics competitiveness, the Thai government also initiates a so-called Landbridge project linking the Indian Ocean to the Pacific through pipeline, railway and road infrastructure. However, the oil pipeline is deemed as the first priority, followed by freight logistics. In light of such a project, Pak Bara will become a terminal of land bridge for Andaman Sea-Pacific Ocean. The project enables freight traffic to bypass the Strait of Malacca and head directly into the South China Sea and vice versa through land transport and a seaport on the eastern shores such as Laem Chabang and Songkhla port. If this happens, the issue of Thailand as a logistics hub is even more promising.

Dawei Port

While the plan to construct Pak Bara port in Satun is controversial and has been put on hold due to a series of protests against the project by NGOs and local residents, the Thai government has approved plans to

develop a large seaport and industrial estate in Dawei in the south of Myanmar. A key contractor of the project is the Italian-Thai Development Public Company Limited (ITD), which signed a 60-year framework agreement with the Myanmar Port Authority.

This mega project includes construction of a port and industrial estate on a land of 250 sq. km., which will become the first special economic zone of Myanmar. The development is partitioned into three phases. The first phase (from 2010 to 2015) involves the development of major infrastructure. The second phase will cover the construction of the Dawei port, with a planned capacity of 100 million metric tons per year. The third phase will be concerned with the development of an industrial estate, consisting of six zones: port and heavy industry, oil and gas, upstream and downstream petrochemical product complexes, medium industry, and light industry. The planned industrial estate is expected to be the largest in Southeast Asia (East Asia Forum, 2012).

Supporting Logistics Infrastructure

Besides the main seaports and planned construction projects mentioned earlier, other logistics infrastructure can also play a crucial role in strengthening Thailand and Indochina's connectivity with Korea trade. Some important infrastructure is discussed below.

1. Chiang Saen Port

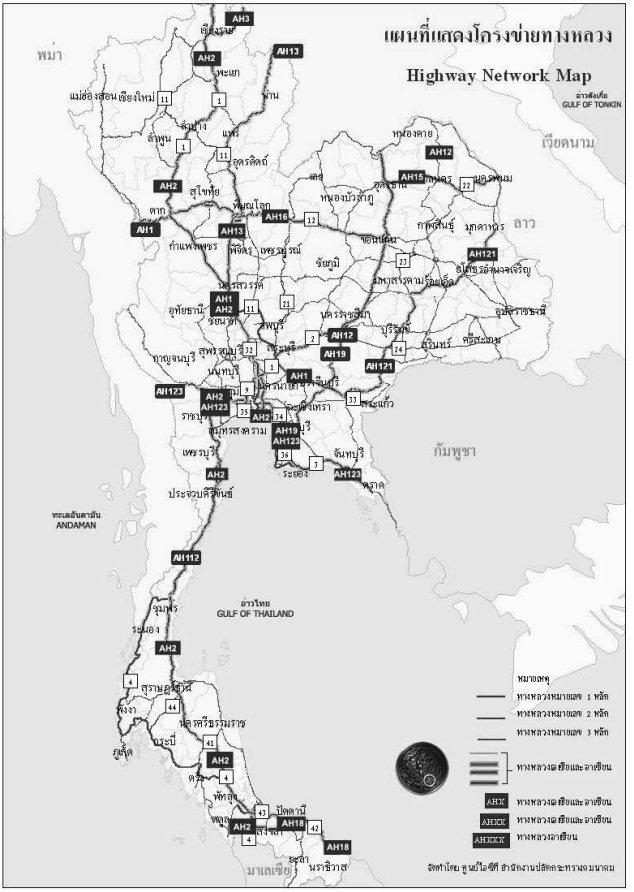
Located in Chiang Rai, a province in the northern part of Thailand, facing Laos PDR across the Mekong River, Chiang Saen Port is an international inland port and is considered a gateway for trade from the upper Greater Mekong countries of China, Myanmar and Lao PDR. The port has a total area of 153 acres and is managed by the Port Authority of Thailand (PAT News, 2012b). With road networks connecting with the EWEC and NSEC, Chiang Saen Port can serve cargo transport to Korea and other countries in the east via the Bangkok Port and Laem Chabang Port as well as countries in the west via Ranong Port to form a triangle transport network.

2. Road and Rail Connectivity

Road transport is the dominant mode for domestic freight transportation in Thailand with a 87% share. In terms of Thailand's international freight, road transport expanded consecutively since 2007 with 44 percent growth in 2008 and 32 percent growth in 2009, respectively. Volume of road transport by truck across the Thai border was more than 21 million tons in 2009, contributing to the double increase in proportion of road transport from 5 percent of all international freight in 2007 to 10 percent in 2009 (Ministry of Transport, 2010). This confirms that road transport is of great importance to international trade transiting Thailand, and is thus a crucial component of regional supply chains.

Thailand possesses the most developed road network and facilities with China in the GMS. There is over 51,777 km. of national road with national road density of 0.10 km./sq.km. (Banomyong *et al*., 2010). This

well-developed road network, especially in connection with both NSEC and EWEC, can enhance ASEAN connectivity and support the movement of goods from Korea via Thailand's major seaports to land-locked regions and countries with no direct service with mainline carriers.



Source: Ministry of Transport

Fig. 5 Thailand's Highway Network

Railways are considered the weakest links in Thailand's transportation infrastructure with low service reliability due to several reasons, i.e. the rail track is based on the metre-gauge system and most sections are single-tracked. Moreover, the rail system is not connected with neighboring countries. However, while Thai rail transport is not supporting the logistics network integration within ASEAN at the present time, the Thai government has announced the project of developing a high-speed rail system linking Kunming in southern China to Padang Besar in Malaysia via Vientiane in Lao PDR, Nong Khai and Bangkok in Thailand. Such a project will provide a linkage between Pak Bara Port and China's heartland, and will eventually enhance logistics integration in the Indochina region.

Discussions

There are several alternative logistics routes for the movement of products between Korea and countries of Indochina via Thailand as a transit node. Laem Chabang and Bangkok Port become the key elements of Korea-Indochina connectivity. Port choices depend on vessel sizes and type of cargoes handled. While Bangkok Port cannot accommodate ships of size greater than 12,000 DWT, Laem Chabang Port could cope with Post Panamax vessels (80,000 DWT, with capacity to carry more than 5,000 TEUs). Given the completion of Laem Chabang Port's Phase 3 in 2017, the port will be able to serve Super-Post Panamax vessels (100,000 DWT, with capacity to carry more than 10,000 TEUs) with the total capacity of 18 million TEUs per year.

The logistics infrastructure under the NSEC and EWEC can further pick up the transit traffic from Laem Chabang and Bangkok Port to neighboring countries. The Kunming-Bangkok corridor of the NSEC, which passes through either Myanmar (R3W) or through Lao PDR (R3E) or along the Mekong River via Chiang Saen Port in the northern Thailand, can facilitate the flow of cargoes heading to the upper Greater Mekong countries. The first route, R3W, passes along Bangkok - Chiang Rai - Mai Sai - Keng Tung - Mengla - Menghi - Yunjinghong - Kunming. The R3E stretches from Bangkok - Chiang Rai - Chiang Khong - Houayxay - Luangnamtha - Boten - Mohan - Kunming. The third route goes through Bangkok - Chiang Rai - Chiang Saen - Mekong River - Yunjinghong/Kuanlei – Kunming (see Fig. 1. for illustrative details). It is significant to note that the one via the Mekong River is the most utilized whereas the R3W route has not been officially used for transit purposes because of security constraints in Myanmar.

The EWEC can support the freight transportation from Danang in Vietnam, Laem Chabang and Bangkok Port in Thailand to Mawlamyine in Myanmar through several cities in Vietnam, Lao PDR, Thailand and Myanmar. It is estimated that the transit time for the NSEC is more than 70 hours for the 1,800 kilometre journey compared to the less than 24 hours transit time for the EWEC (Banomyong, 2010).

As for trade and investment between Korea and countries requiring linkages between the Indian Ocean and the Pacific, the Landbridge project with pipeline and land transport infrastructure, connecting seaports on both

eastern and western shore of Thailand, can offer a shortcut for cargo flow to bypass the Strait of Malacca. However, this route will be feasible only when the development of major seaports on the west coast of the country, e.g. Pak Bara, is completed.

Source: Ministry of Transport

Fig. 6 Strategic Location of Thailand in the Indochina Region

The Dawei project, which is concerned with the construction of a large seaport and industrial estate in the south of Myanmar, has a great potential to boost up Thailand into a major transit hub for the EWEC. Intermodally, it is possible to utilize the EWEC to accommodate the transit flow from Laem Chabang and Bangkok Port to Dawei Port. By doing so, traversing the Malacca Strait is unnecessary.

The routing scenarios discussed earlier are associated with container and general cargo movements. With respect to transshipments of oil, natural gas and petrochemical goods, it is likely that both Dawei and Pak Bara Port will be favorable options as neither Laem Chabang nor Bangkok is an oil port. At present, oil imports from the Middle East for East Asia, especially China, Japan and Korea go through the Strait of Malacca. It is estimated that costs of oil transport via the Landbridge, linking Songkhla Port on the east coast to Pak Bara Port, would be $0.30-$1 per barrel lower than those of passing through the Malacca Strait (THAIINTELLIGENTNEWS, 2010).

It is significant to note that most physical linkages are currently completed and several projects of developing major infrastructure are set to be in place in the near future. However, besides physical infrastructure, there exist other key success factors, which have been long overlooked. Of importance is institutional framework supporting the efficient and effective movement of goods is still lacking and remains to be further considered.

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