

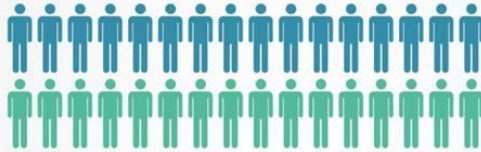
CAMBODIA MARKET OVERVIEW



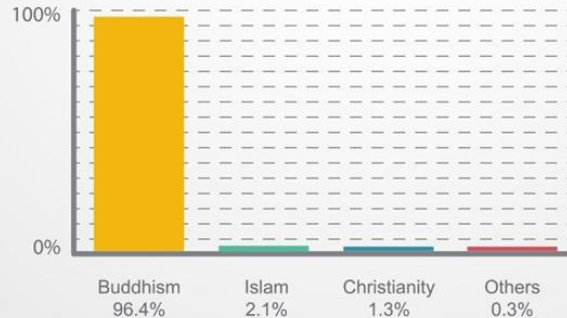
CAMBODIA



1 Population
17,148,513



2 Main Religion
Buddhism



3 CAPITAL CITY
Phnom Penh

4 CURRENCY
USD

5 LANGUAGE
Khmer

6 LANDMARK
Angkor Wat Temple
Silver Pagoda
Siem Riep

CAMBODIA MISGUIDED PERCEPTIONS

#1

PERCEPTION: Cambodia is a poor, under developed country, recovering from genocide.

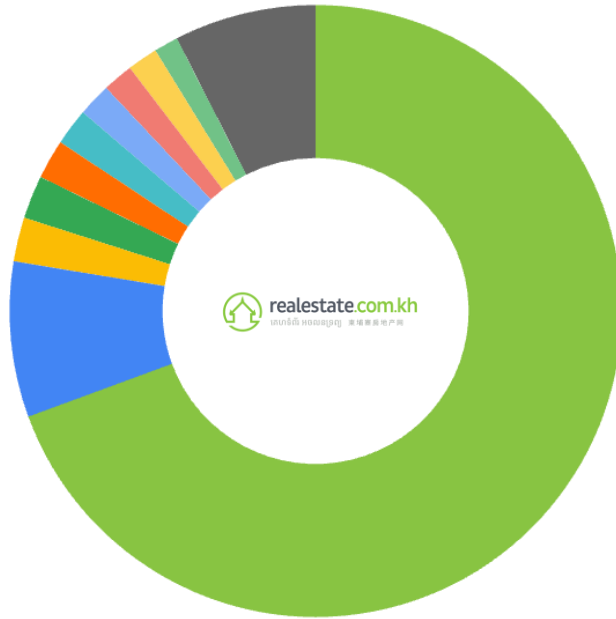
REALITY: This is far behind Cambodia and almost 50 years ago. Cambodia is a **“lower middle income country” (2015)**, same as Argentina, Brazil, and the Philippines. Aspiring to attain upper middle-income status by 2030

#2

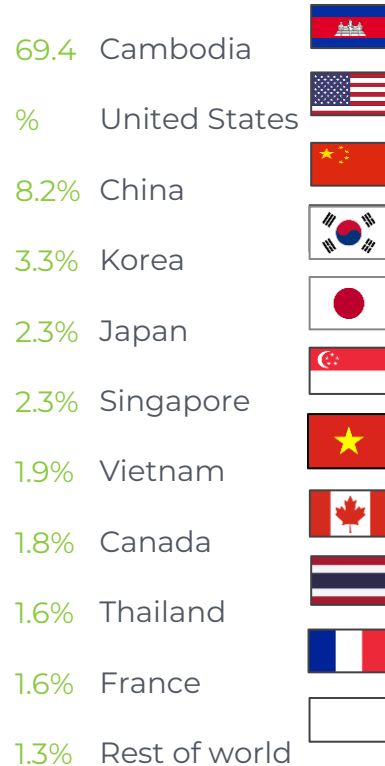
PERCEPTION: Cambodia has poor infrastructure, low electrification, high deforestation & low average life expectancy.

REALITY: Infrastructure is greatly improved and continues to be. Electrification is 87%, 46% forest still remains of land area, life expectancy is 70 years, ease of doing business, improvements in legal system & growth in government engagement with private sector

ONLINE TRAFFIC FOR REAL ESTATE SEARCH TERMS ON GOOGLE (Relating to real estate)



Note: Chinese can not access google



Source: google analytics

WHY CAMBODIA?

WHY CAMBODIA: **SNAPSHOT**



The highest consistent growth rates in ASEAN.

The GDP Growth rate has averaged 7%+ since 1998



Companies can be 100% foreign owned in Cambodia



Foreigners can own freehold properties 100%, (anything above ground floor)



Cambodia has one of the fastest urbanisation rates in ASEAN



Largely a USD economy, USD is more widely used than Khmer riel



Huge construction investment - a total of 1.2 billion was invested first half 2022 & 9.3 billion in 2019



8th largest economy in SouthEast Asia, but one of the fastest growing and an ideal frontier market



Favourable investment laws, Combined with an emerging trust law, to allow foreigners to own land



Golden visa, with benefits greater than Thailand or Malaysia.



Rapid infrastructure development, major highways, bridges & 3 new international airports

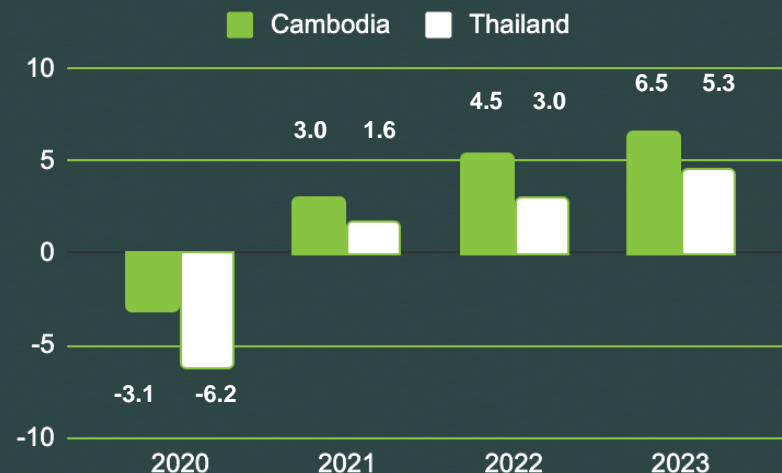
CAMBODIA ECONOMIC OUTLOOK



Cambodia sustained an average growth rate of 7.7% between 1998 - 2019

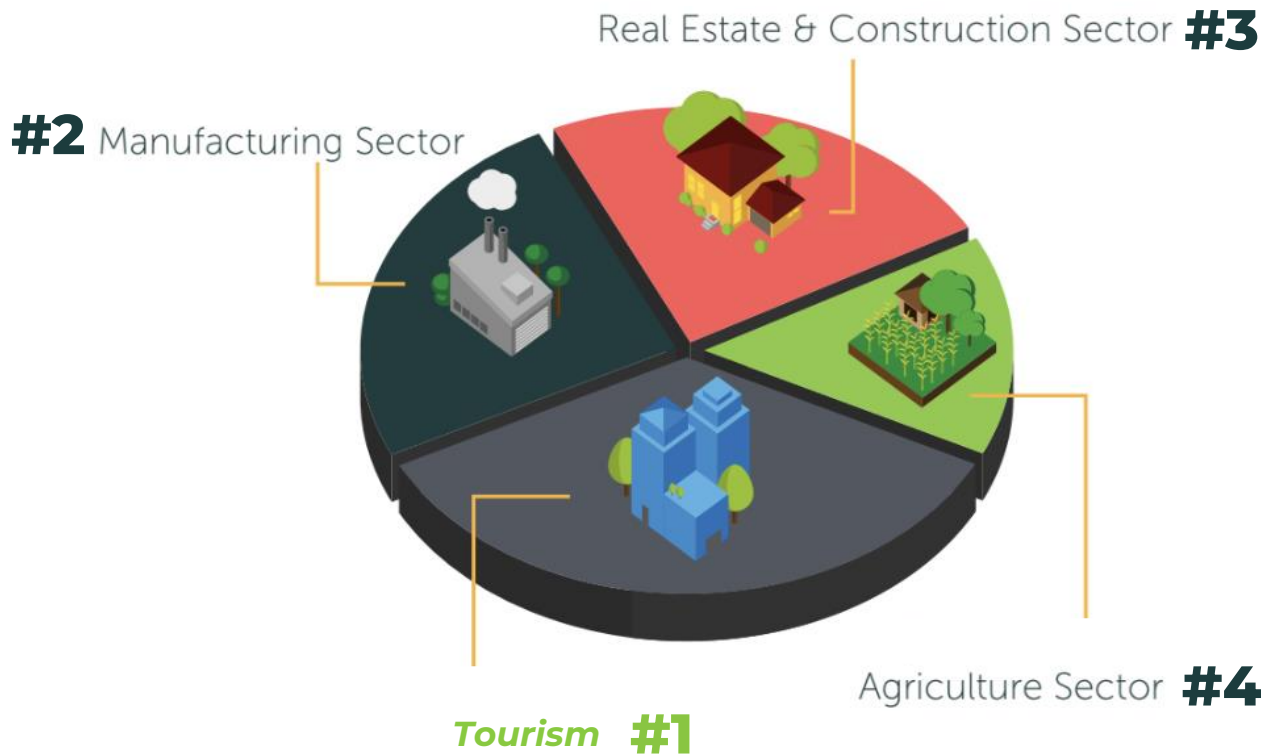
THE ASIAN DEVELOPMENT BANK HAS EVEN LABELLED CAMBODIA AS **THE NEW "TIGER TIGER ECONOMY"** DUE TO THE NATION'S **CONSISTENT ECONOMIC GROWTH.**

Cambodia's GDP growth has been recognised on a global scale as one of the fastest growing economies in the world and this is anticipated to continue for the next 5 - 10 years.



Source: Asian Development Outlook
<https://www.adb.org/countries/cambodia/econom>

CORE INDUSTRIES



Tourism

#1

11% of gross domestic product

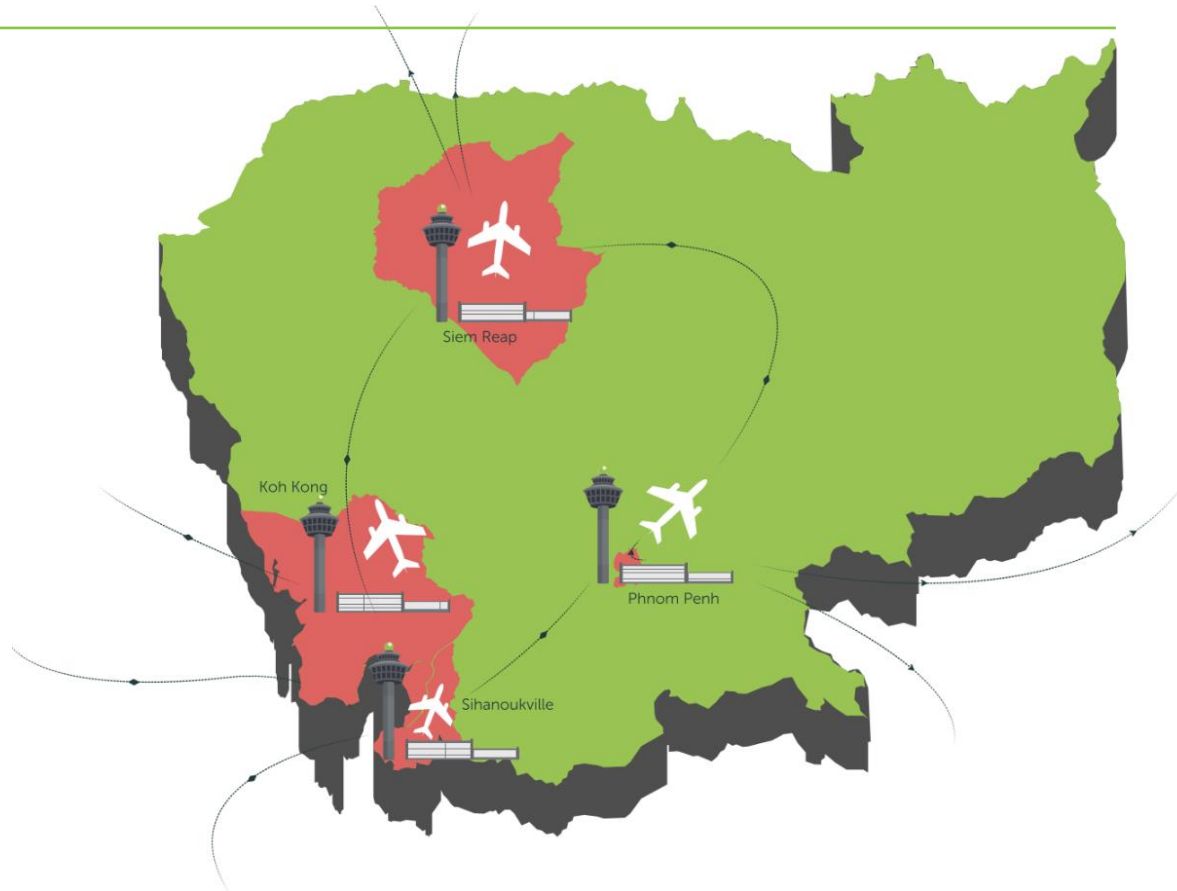
Generates tourism receipts equivalent to \$2.2 billion

Contributes 12.4% of the total population

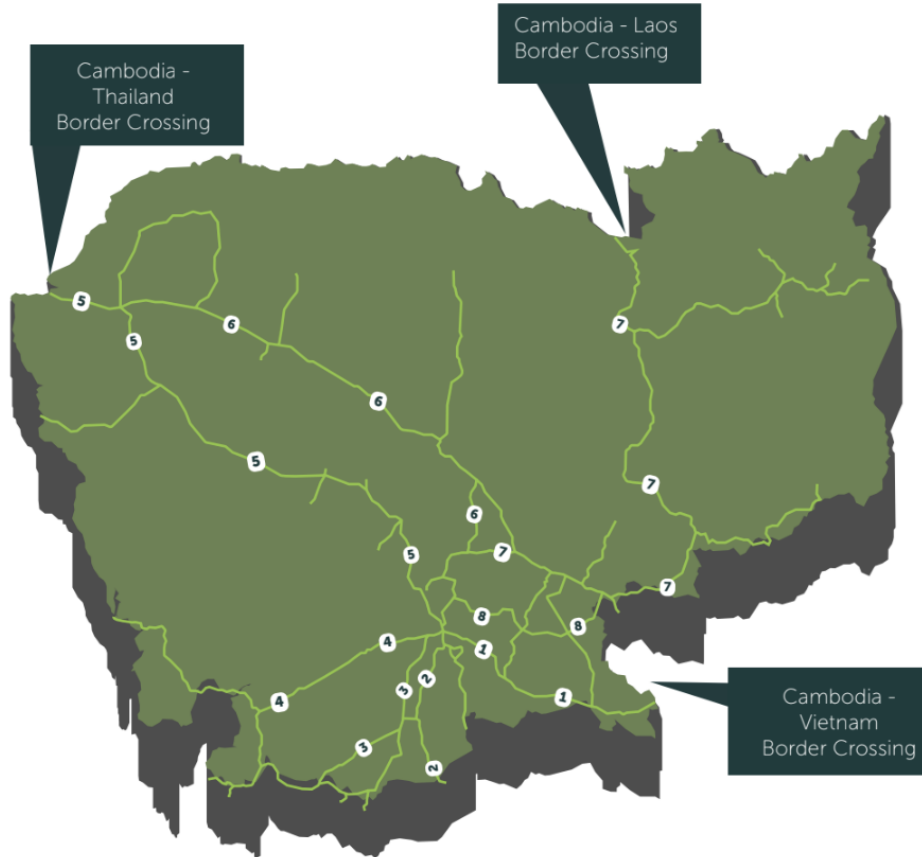
Note: During covid Agri sector grew, as clearly tourism rapidly declined.

Tourism is up 560% so far in 2022

KEY INVESTMENT DESTINATIONS / MAJOR CITIES



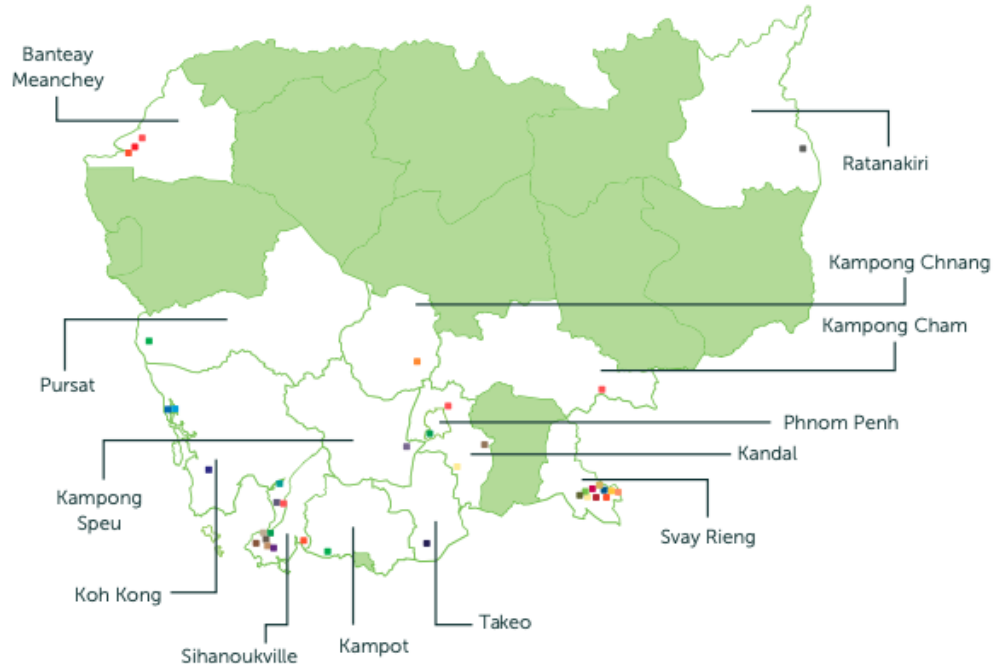
CAMBODIA MAJOR HIGHWAYS & BORDERS



CAMBODIA SPECIAL ECONOMIC ZONES

#54

SPECIAL ECONOMIC ZONES, AS AT 2019 .



Most companies are from

-  China
-  Thailand
-  Vietnam
-  Hong Kong
-  Malaysia
-  Singapore
-  USA
-  Philippines

PHNOM PENH 2022



PHNOM PENH



realestate.com.kh

គេហទំព័រ អចលនទ្រព្យ ភ្នំពេញ ភ្នំពេញ ភ្នំពេញ

PHNOM PENH



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គេហទំព័រ អចលនទ្រព្យ ភ្នំពេញ ភ្នំពេញ ភ្នំពេញ

PHNOM PENH 2022





SIEM REAP - 2021

SIEM REAP 2022



SIEM REAP



PHNOM PENH -SIHANOUKVILLE EXPRESSWAY



SIHANOUKVILLE 2003



SIHANOUKVILLE - 2018



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គេហទំព័រ អចលនទ្រព្យ ភ្នំពេញ ភ្នំពេញ ភ្នំពេញ

SIHANOUKVILLE -2021



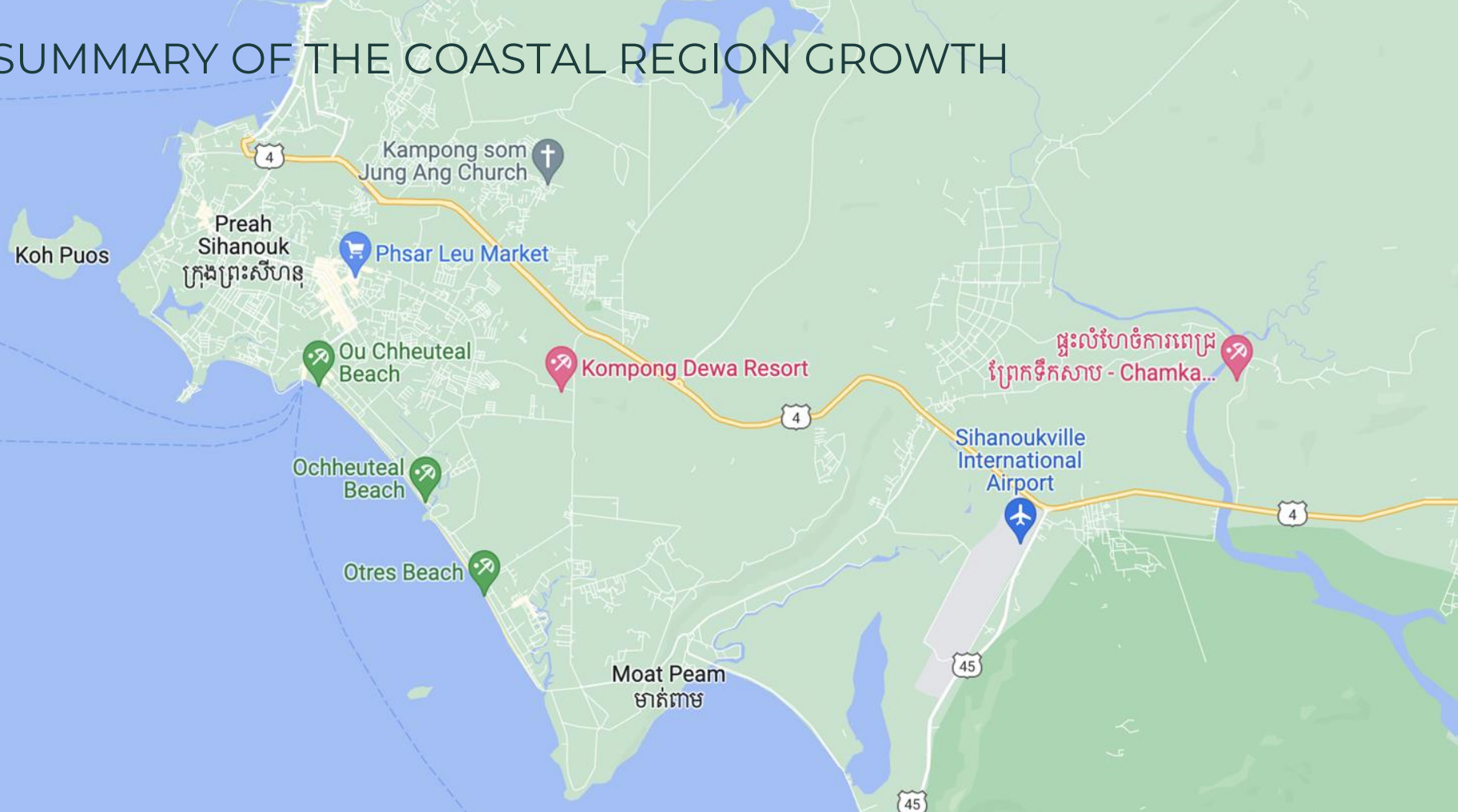
SIHANOUKVILLE 2022



CAMBODIA'S DEEP SEA PORT

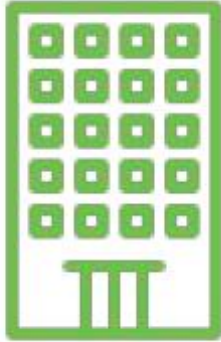


SUMMARY OF THE COASTAL REGION GROWTH





QUICK OVERVIEW OVERVIEW OF THE RESIDENTIAL PROPERTY TYPES



CONDOMINIUMS

- International investors / buyers
- Growing local interest
- Mainly Phnom Penh
- Sihanoukville next hot location with huge growth potential
- 3 Projects in Siem Reap
- 100% foreign owned, via a hard title (strata title)



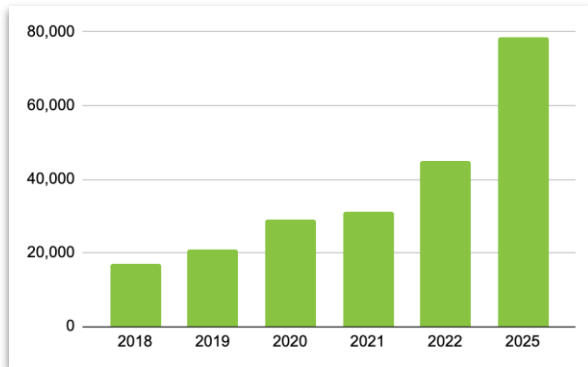
LANDED PROPERTY (BOREYS)

- Traditionally local buyers
- Growing foreign interest
- Located outside of city centers
- Foreign ownership via a Trust
- 100% legal & transparent ownership for foreign buyers via a Trust

SUPPLY & PRICES

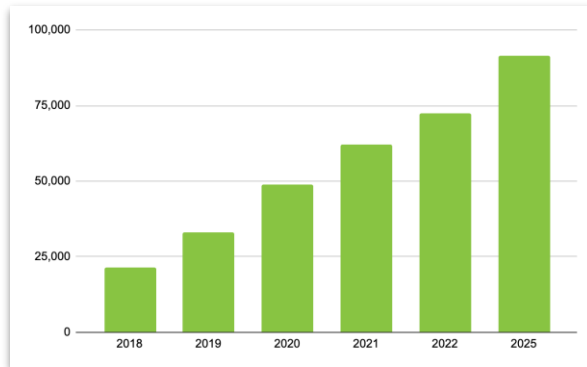
The image shows a cityscape with a mix of traditional and modern architecture. In the foreground, there are several traditional Khmer-style buildings with ornate, golden spires and tiered roofs. Behind them, several modern high-rise buildings are under construction, with cranes visible against a clear sky. The text 'SUPPLY & PRICES' is overlaid in white on a dark blue background in the center of the image. The overall scene is a blend of old and new, suggesting a city in development.

CAMBODIA RESIDENTIAL SUPPLY



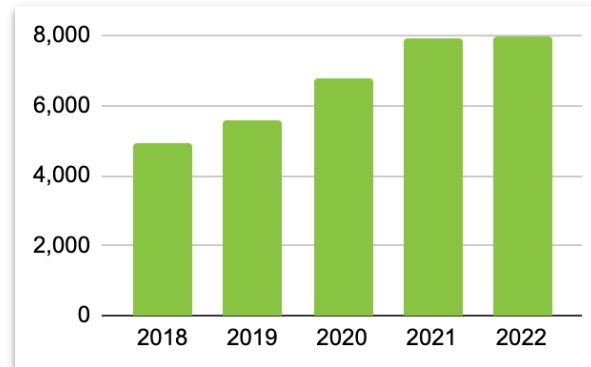
CONDO SUPPLY

- International investors / buyers
- Growing local interest
- Mainly Phnom Penh
- 3 Projects in Siem Reap
- 5 Active projects in Sihanoukville
- Almost 80,000 expected by 2025



LANDED PROPERTY | BOREY

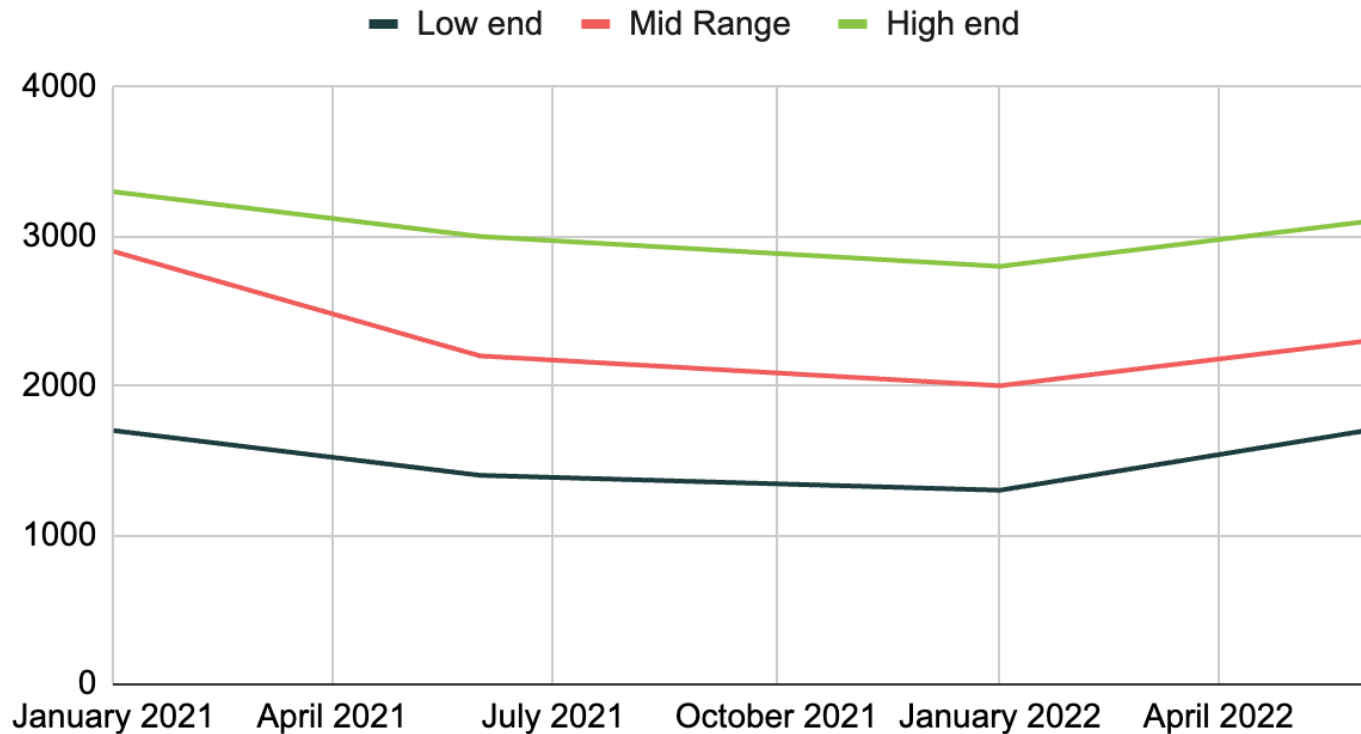
- Local buyers / investors
- Growing international interest
- Mainly Phnom Penh
- Some activity in Siem Reap
- Some activity in Sihanoukville
- Almost 80,000 expected by 2025



SERVICED APARTMENTS

- 95% expat focused
- 60% occupied
- Mainly in Phnom Penh
- 1 or 2 in Siem Reap & Sihanoukville

CAMBODIA OFF PLAN CONDO - PRICING



OPPORTUNITIES IN CAMBODIA REAL ESTATE



ENTERTAINMENT

HOSPITALITY / 3-
5 STAR HOTELS

INTERNATIONAL
RETAIL BRANDS

LEISURE
ACTIVITIES

REGIONAL &
COASTAL
DEVELOPMENT

Think Golf Island Pik....