

2022

해외물류시장 투자설명회

인도네시아 물류·운송 터미널: 현황 및 전망

Dr. Safuan 기업대표비서
Terminal Petikemas Koja





INDONESIA LOGISTICS & TRANSPORTATION TERMINALS

CURRENT STATUS & PROSPECTS

Presented by Dr. SAFUAN. S.T., M.T., M.M. – Corporate Secretary at KSO Terminal Petikemas Koja

The 2022 Business forum is hosted by the Ministry of Oceans and Fisheries and supervised by the Korea Maritime Institute.

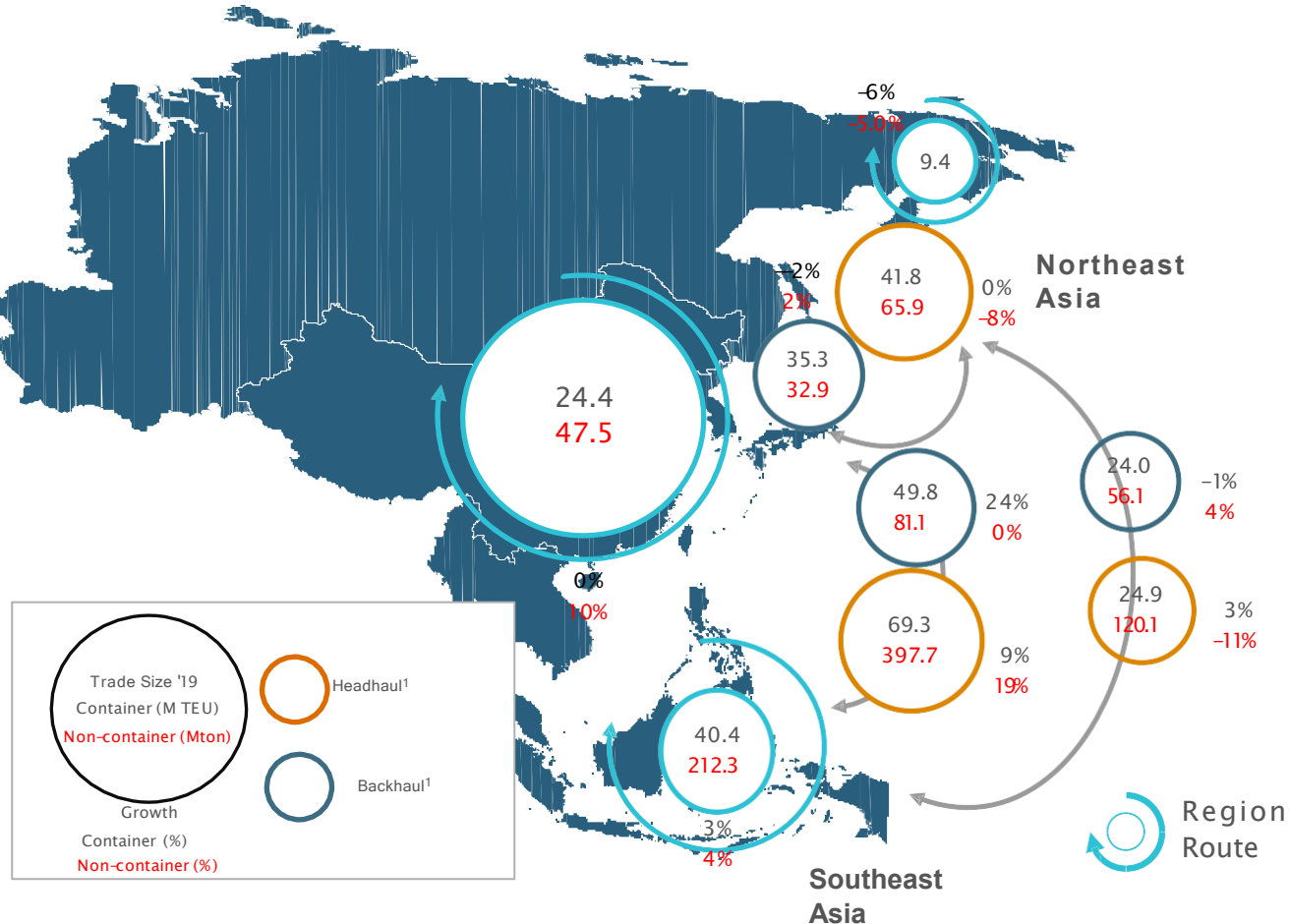
Indonesia Maritime Logistic Issue

Indonesia has vision to become global maritime axis but
Indonesia still faces several issues regarding maritime
logistic shown from the high logistic cost

Indonesia's maritime Trade Volume

The growth of trade volume in Southeast Asia drives the growth of the Indonesian Port market by 3% p.a until 2025

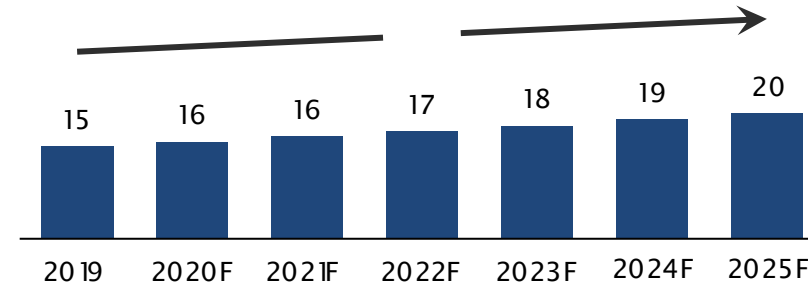
Asia sea trade flows in 2019 (M TEU/MTon)



Source: BCG Container Demand & Supply Forecast model (IHS GTA Forecasting (end of 2020), Alphaliner, EIU, Oxford Economics), Data Pelindo, MoT, BPS, RPJMN, Press Research, Analisis BCG

Indonesian container market size

(Mn TEU)

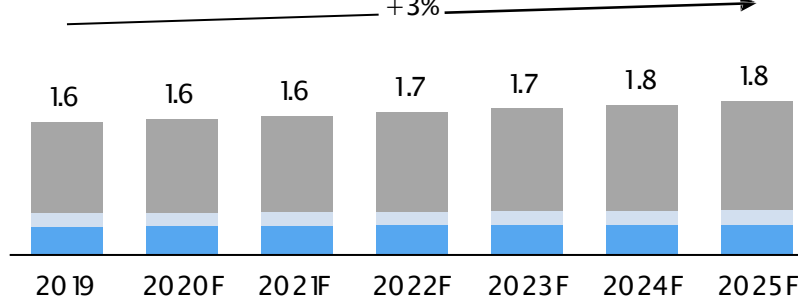


Integrated Pelindo Market Share in Indonesian Container Market

> 95%

Size of Indonesia's non-container market

(Bn Ton)

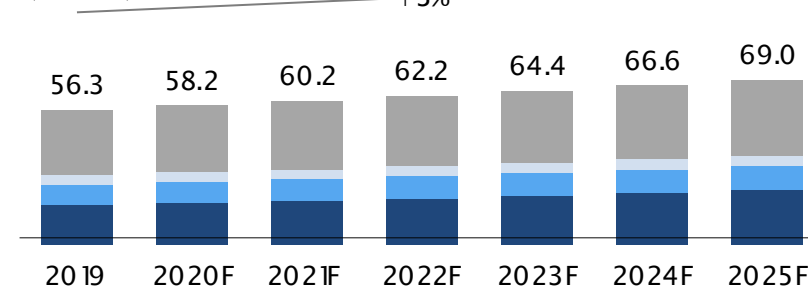


Integrated Pelindo Market Share in Indonesia's Non-Container Market

~ 15%

Indonesian Port Market Revenue

(IDR Tn)



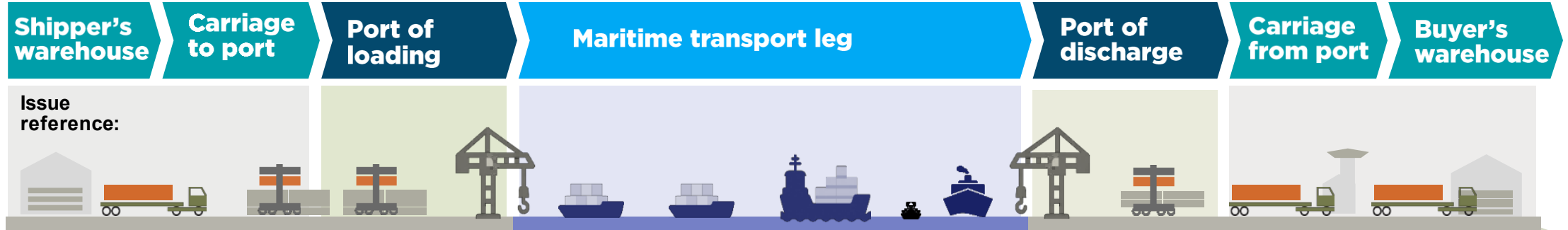
General cargo
 Liquid bulk
 Dry bulk
 Container

Main issues cause inefficiencies in maritime connectivity

End-to-end maritime logistic value chain - 5 main drivers for high logistic cost

1 a. Demand-Supply Imbalance

b. Low containerization of key commodities in less developed region



2 Suboptimal Port Performance

- a. Constrained port infrastructure (draft, capacity)
- b. Inefficient port operations
- c. Suboptimal capex allocation with significant overinvesting

3 Low Maritime Value Chain Efficiency

- a. Fragmented and uncoordinated shipping liner market
- b. Overuse of small vessel sizes creating inefficiency

4 Low Land Value Chain Efficiency

- a. Overreliance on trucking, with congestion and low road quality
- b. Low professionalization and coordination in trucking and warehousing

5

Unconducive Government Regulations

- a. Excessive bureaucracy or over-regulation creating logistical inefficiencies
- b. Ineffective implementation of existing regulations
- c. Lack of incentives to encourage collaboration, competition, or ecosystem improvement

Solution to solves logistic issues

There are several actions that need to be done in order to solve logistic issues

Government Plans And Aspirations For The Port Sector



Government Aspirations for Logistic Sector



Reduction in national logistics costs



Improved connectivity



Operational performance improvement

Reduction in national logistics costs

- Indonesia's national logistics costs/GDP during 2014–2019 had a downward trend (from 25.7% to 21.0%);
- National logistics costs/GDP of ASEAN countries others in 2014 are still far below Indonesia with an average of 13.5%;
- Target pemerintah adalah untuk menurunkan biaya logistic nasional/GDP menjadi 17% pada 2022
- This target is planned to be achieved by regulatory reform and infrastructure development

Improved connectivity

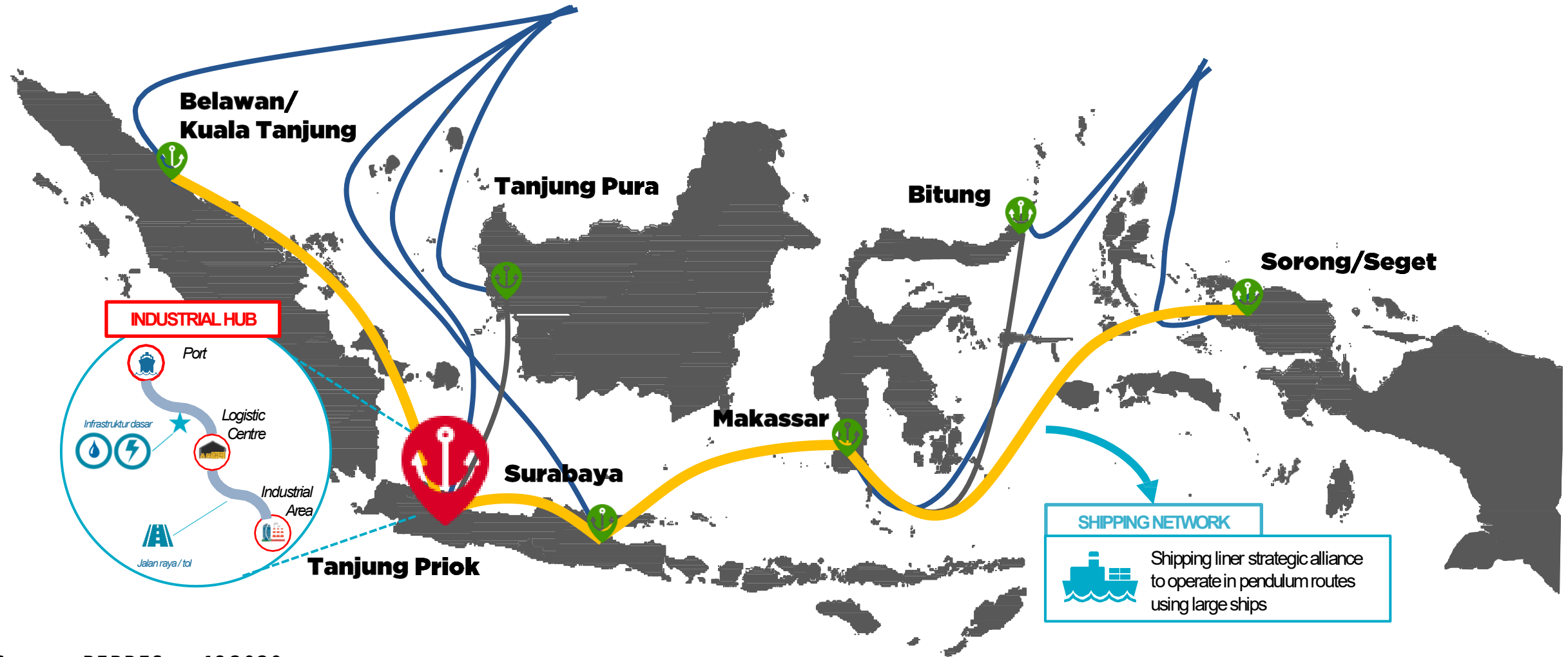
- In 2020, there were 110 routes for pioneer ships. The government plans to increase in 2021 to 118 routes;
- Increased efficiency of domestic shipping routes by forming regular loops;
- Some ways to improve Port connectivity in Indonesia:
 - Development of a new Port
 - Improving and improving existing ports (such as deepening sea tenure)

Operational performance improvement

- Currently, port operations in Indonesia vary;
- Port development is focused on:
 - Physical facilities of the port
 - Loading and unloading efficiency
 - Document administration
- Some ways to improve port operations are:
 - Process standardization
 - Increased QC productivity
 - Digital tools

Indonesia Port Network as solution to solve maritime logistic issue

Based on Perpres No 18 in the year 2020, it stated that the government will develop 7 ports which consist of Kuala Tanjung, Kijing, Tanjung Priok, Tanjung Perak, Makassar, Bitung, Sorong to become hub port



Investment opportunities

In order to implement the concept of Indonesia Port Network, there are several investment opportunities

PT Pelindo Coverage Area



Since its Merger on October 1st, 2021, PT Pelabuhan Indonesia (Pelindo) is the only SoE (State Owned Enterprise) in Indonesia for Port Service Business which territory covers from east to west Indonesia, where we manage 122 commercial ports in Indonesia.

16,4
MTEUS

8th Biggest Port
Operator

122 Ports
4 Regional
4 Sub Holdings



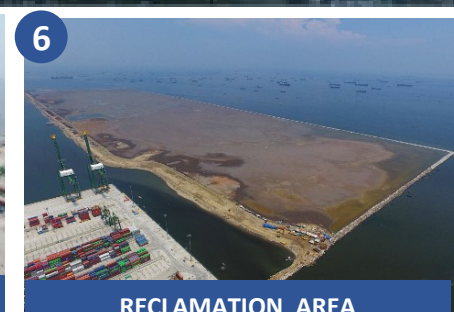
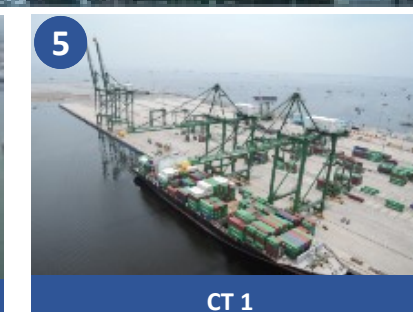
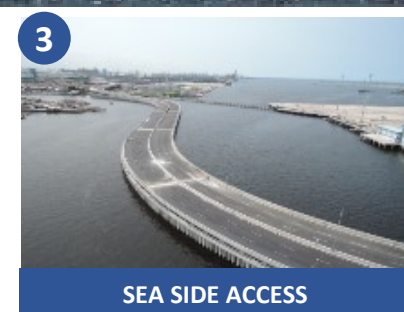
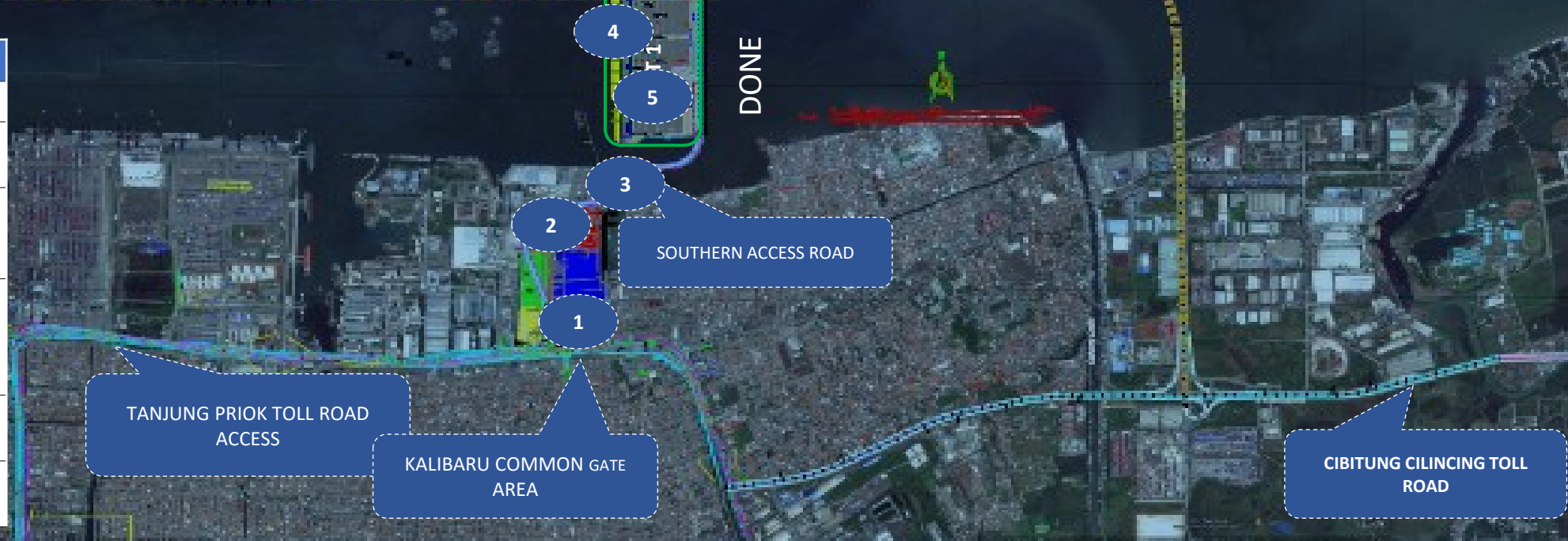
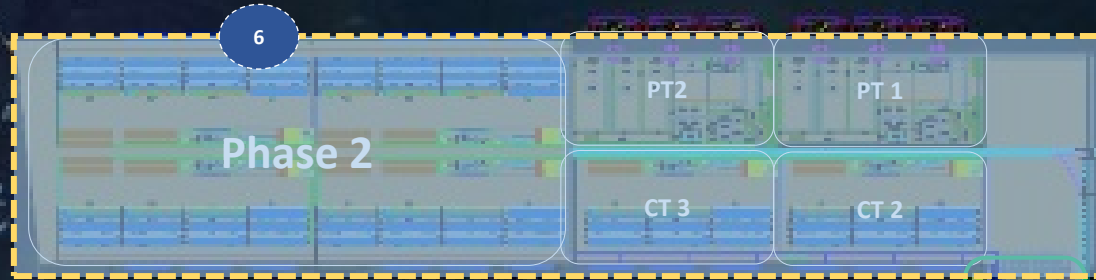
Strategic Development Project



NEW PRIOK TERMINAL

Investors and Operators

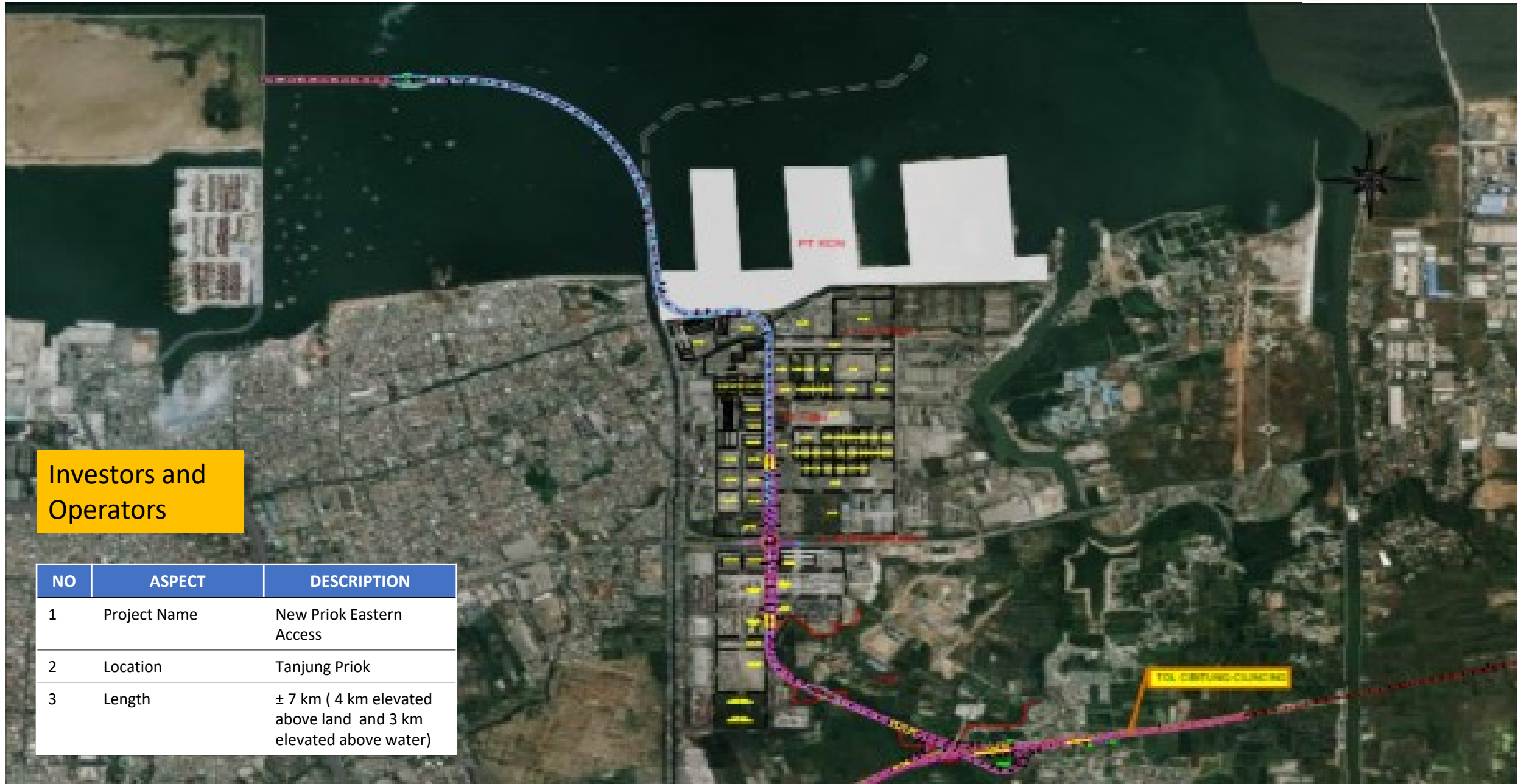
NO	ASPECT	DESCRIPTION
1	Project Name	New Priok Terminal
2	Location	Kalibaru, Tanjung Priok, Indonesia
3	Capacity Container Terminal 1, 2, 3	1.5 M TEUs
4	Capacity Product Petroleum 1 & 3	500.000 m3/Year
5	Quay Length CT 1	850 m
6	Quay Length CT 2 and CT 3	800 m/Terminal



NEW PRIOK EASTERN ACCESS

Investors and Operators

NO	ASPECT	DESCRIPTION
1	Project Name	New Priok Eastern Access
2	Location	Tanjung Priok
3	Length	± 7 km (4 km elevated above land and 3 km elevated above water)



KIJING TERMINAL DEVELOPMENT



NO	DESCRIPTION	
1	Location	Mempawah, Kalimantan Barat, Indonesia
3	Capacity (Ultimate)	Container: 1.95 M TEUs Dry Bulk: 15 Mton Multipurpose: 1 M Ton Liquid Bulk: 12 M Ton
4	Development Initial Phase (1A)	Container Terminal (1000 x 100m) Trestle (3450 x 19,8m)
5	Yard	32.8 Ha (Container Yard On Shore + Offshore) 27.2 Ha (Liquid Bulk On Shore + Offshore) 24.6 Ha (Dry Bulk On Shore + Offshore) 21.3 Ha (Multipurpose On Shore + Offshore) 130 Ha Backup Area



- Port Operator
- Investors & Operators in Kijing support area

BENOA MARITIME TOURISM HUB



- A Benoa Existing
- B Tourism facilities support area
- C Area Development I
- D Area Development II
- E Bali Tenten
- F Danu Kerthi & Melasti Garden

NO	DESCRIPTION	
1	Location	Benoa, Bali, Indonesia
2	Total Area	143 Ha
3	Detail Area	- Development Area 1 - Yatch Terminal 25 Ha - Development Area 2 - Cargo Oil & Gas : 17 Ha and Container Cargo : 5 Ha

TELUK LAMONG TERMINAL DEVELOPMENT



Investors & Operators

63 Ha

DONE
Phase 1 + 2

323 Ha

NEXT PROJECT
Phase 3

88,9 Ha
Terminal Area (Container)

19,3 Ha
Office Area

1,72 Ha
Green Space

175,5 Ha
Cargo consolidation & distribution

34,6 Ha
Port Associated Industries

20,1 Ha
Office Area and support line area

26 Ha
Terminal Area (dry & liquid bulk)

20 Ha
Port Associated Industries

NO	DESCRIPTION	
1	Location	Teluk Lamong, West Java, Indonesia
2	Final Capacity	3.6 Million TEU
3	Quay Length	1080 m (Internaional), 2390 m (Domestic) and 500 m (Bulk)
4	Yard	89 Ha (Container Yard), 26 Ha (Bulk), 47.2 Ha (PAI), 7 Ha (Energi), 176 Ha (Logistik), 19.3 Ha (Government)
5	Draft	-13 to-14 mLWS

Termina
Logistic

MAKASSAR NEW PORT (MNP) DEVELOPMENT



NO	DESCRIPTION	
1	Location	Makassar, South Sulawesi, Indonesia
3	Final Capacity	2.25 Million TEU (Currently 0,7)
5	Berth Length	1642 m (Currently 320m)
6	Yard	43 Ha (Currently 11Ha)



Investors & Operators

KUALA TANJUNG
PORT & INDUSTRIAL ESTATE
Next Indonesia's Logistic and Supply Chain Hub

MULTIPURPOSE
TERMINAL

INDUSTRIAL
ESTATE

DEDICATED TERMINAL
DEVELOPMENT

Timeline

- Fase I
Kuala Tanjung
Multipurpose Terminal
2015 - 2019
- Fase II
Industrial Area Development
(1128 Ha)
2021 - 2030
- Fase III
Dedicated Terminal
Development & Industrial
Area Expansion - Logistic & Supply Chain Hub
(3400 Ha)
2026 - 2048

Investors and Operators of
industrial estates

NO	DESCRIPTION	
1	Location	Batu Bara District , Province of North Sumatera
3	Total Area	3.400 Ha

KUALA TANJUNG PORT DEVELOPMENT

TRESTLE

Length : 2.8 Km
Width : 18.5 M
Road Lane : 4 truck
Pipeline : 4 line (carbon steel)
Pump cap : 250 MT/Hour

Draft: -17 M Lws

GENERAL CARGO

Length : 150 m
2 Mobile Harbor Crane

CONTAINER WHARF

Length : 500 m
Mooring Dolphin : 40 m
Width : 60 M
Max ship size : 60.000 DWT
3 STS Crane (Post Panamax)
2 Mobile Harbor Crane

LIQUID BULK WHARF

Length : 350 m
Width : 60 M
Max ship size : 50.000 DWT
3 Marine Loading Arm
6 Quick Coupling

Draft: -16 M Lws

Next stage investors
and port operators


14 ha
Yard


3 unit
container
crane


21 unit
terminal
tractor


8 unit
automatic rubber
tyred gantry

100,000 MT
Storage Tank
Capacity

600,000 teus
Container Yard
Capacity



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See You Soon....