

# **ASEAN PORT & LOGISTICS 2025**

## **Port-Led Economic Resilience: Mitigating Tariff Impacts through Integrated, Cost-Efficient Logistics**

**PT PELABUHAN INDONESIA (PERSERO)**

**July 2025**



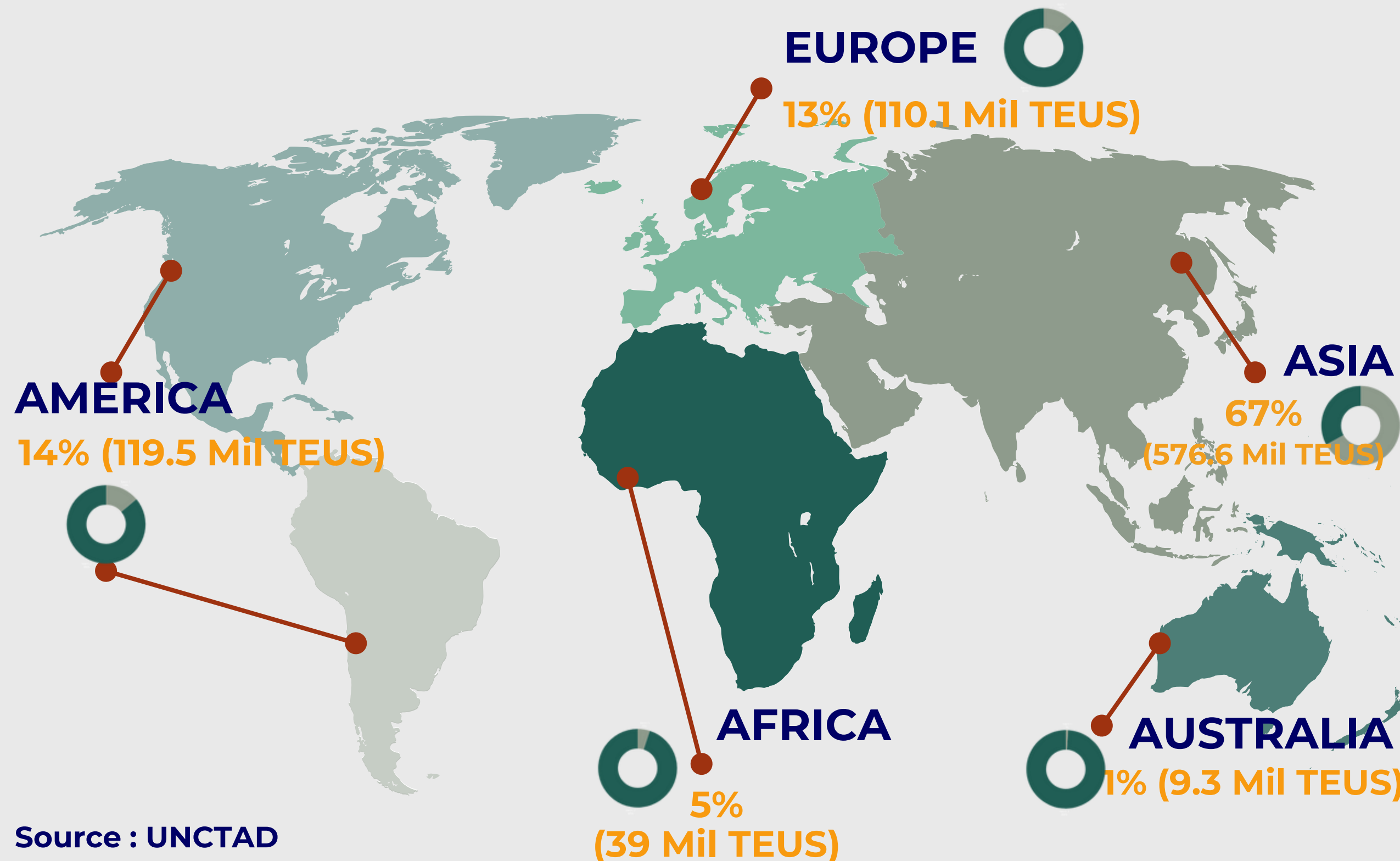
# OUTLINE

- Strategic Importance of Asian Maritime
- Indonesia as a Key Trading Partner in Asia
- Improving connectivity through operational standardization, hub & spoke implementation, integration of ports and industries
- Sustainable port operations
- End-to-End Initiative Digitalization
- Partnerships and collaborations



# ASIA's Significant role in global trade

## WORLD Container Volume 2023 : 858.18 Million TEUS



## ASIA Container Volume 2023 : 576.6 Million TEUS

**62%** East Asia  
359.2 Million TEUS

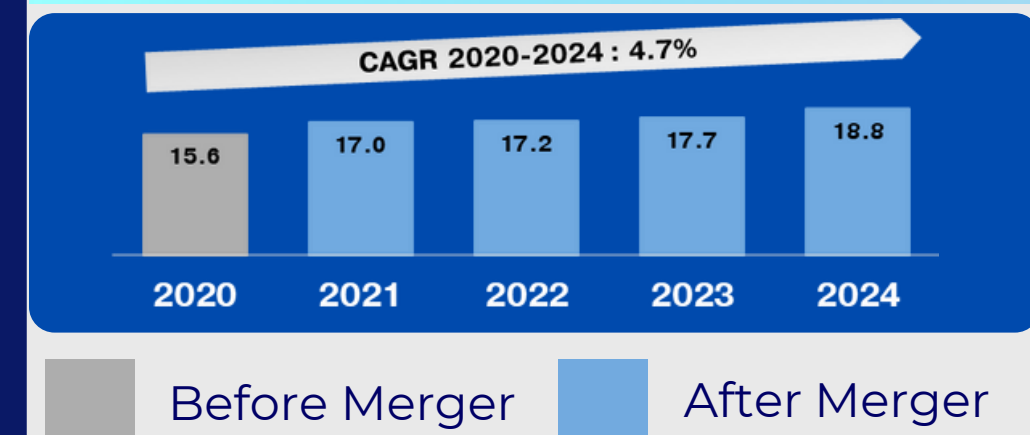
**21%** South East Asia  
121.7 Million TEUS

**7%** South Asia  
37.6 Million TEUS

**10%** West Asia  
58.1 Million TEUS

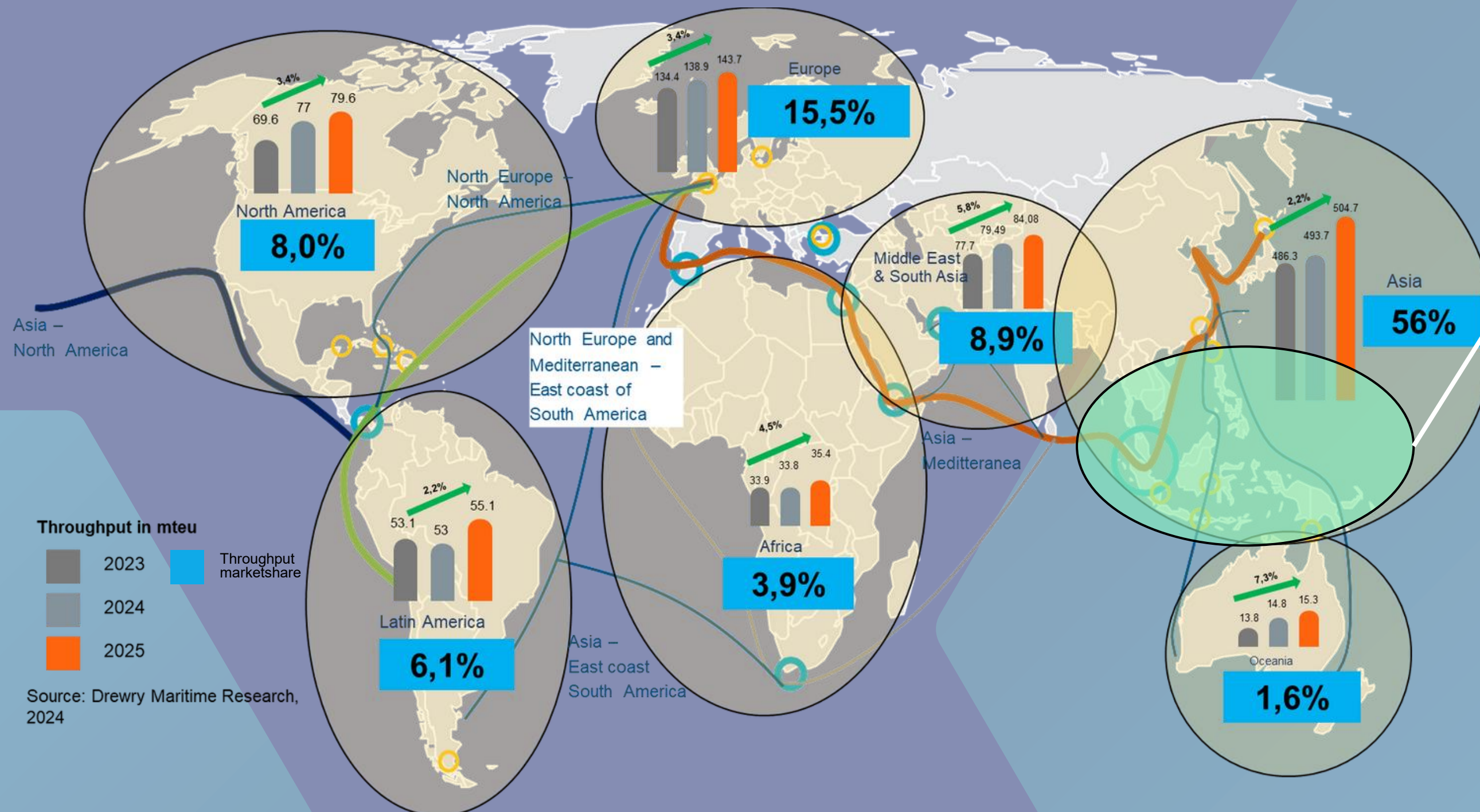
Pelindo serves 3.26% (18.8 Million TEUS) of Asia's Container volume. It reflects in Pelindo's scale of operations :

### Container Throughput (Million TEUS)





ASEAN plays a critical and growing role in global trade due to its strategic location, economic diversity, and collective market power.



Southeast Asia marketshare 2023 **14%**

Indonesia marketshare 2023 **2%**

Key role of ASEAN in global trade



Strategic Geographic Location



Fast Growing Economic Bloc

*Expected to become the fourth-largest economy by 2030*



Global Manufacturing Hub

# Indonesia: A Maritime Giant at the Heart of ASEAN

Indonesia plays a strategic role in regional logistics, serving as a key player in ASEAN trade and port infrastructure development



Total Export Value in 2023

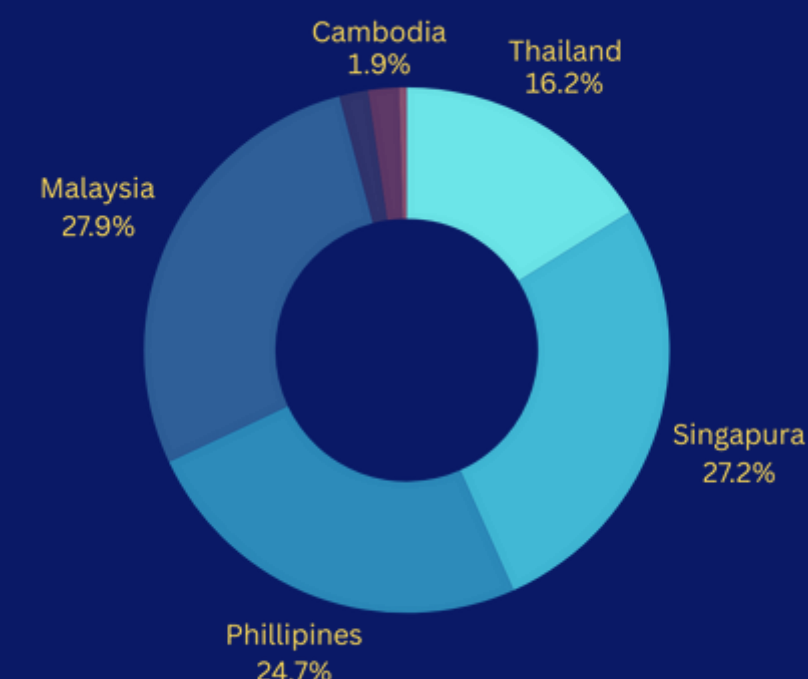
**USD 52,732.6 M**

Total Export commodity in 2023

**701,798.4 Ton**



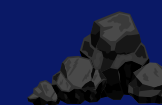
Indonesia's Export Value  
Percentage to ASEAN



Top Export Commodity to  
ASEAN Countries



Car  
\$2 B  
Philippines, Vietnam



Coal Briquet  
\$5 B  
Philippines, Malaysia, Thailand



Palm Oil:  
\$21.38 B  
Malaysia, Vietnam



Petroleum Gas  
\$3 B  
Singapore

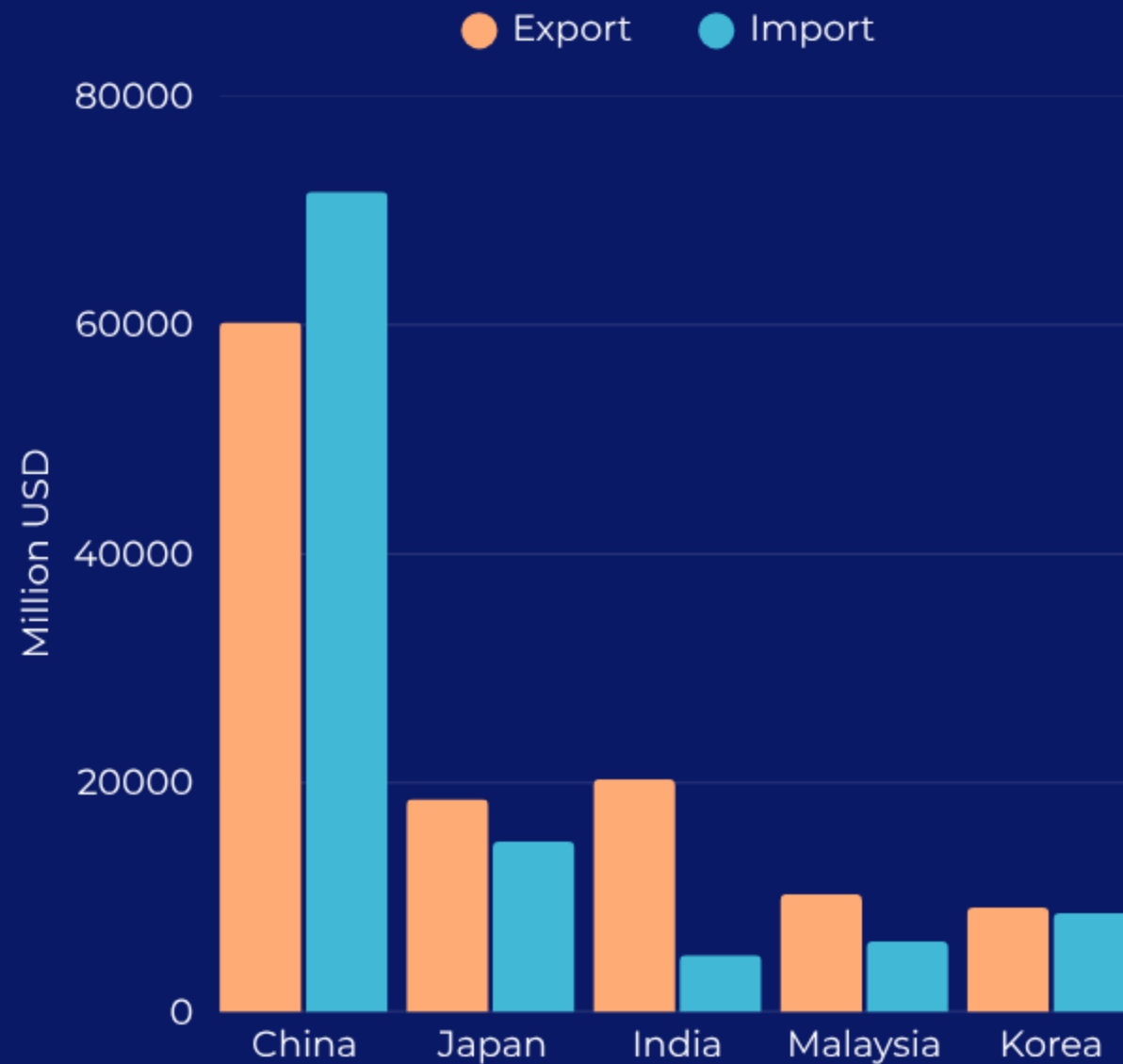


Copper Ore  
\$545 M  
Malaysia, Philippines

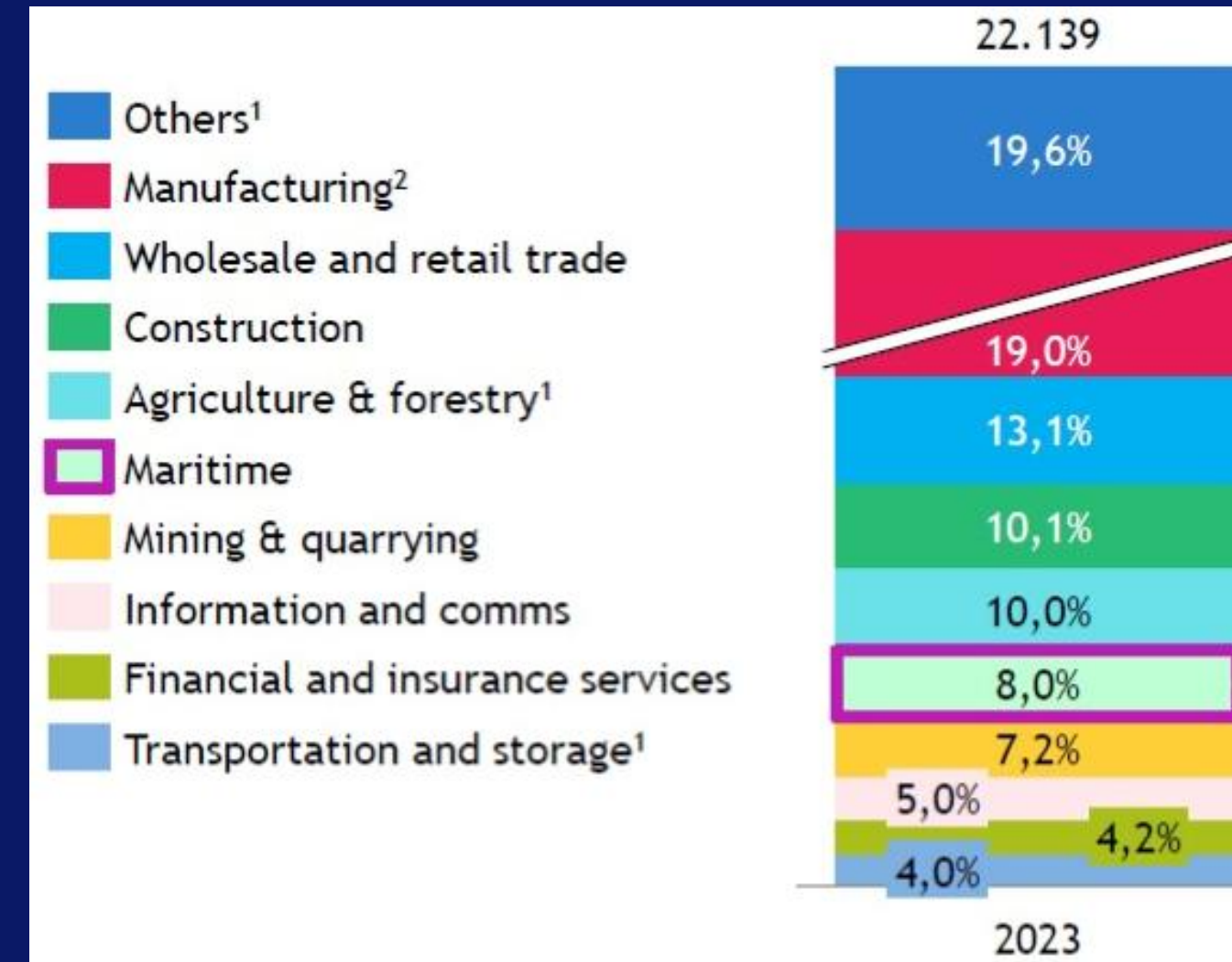


# Indonesia is a key trading partner in Asia

## Top 5 Trading partner in Asia



The Indonesian maritime sector contributes 8% to the country's GDP in 2023 (±IDR 1.770T) and the Government aims to increase this contribution to 15% by 2045.



Source : BPS

## KEYROLE Of Asia in Global Trade

Source : UNCTAD



Strategic Geographic Location



Fast Growing Economic Block

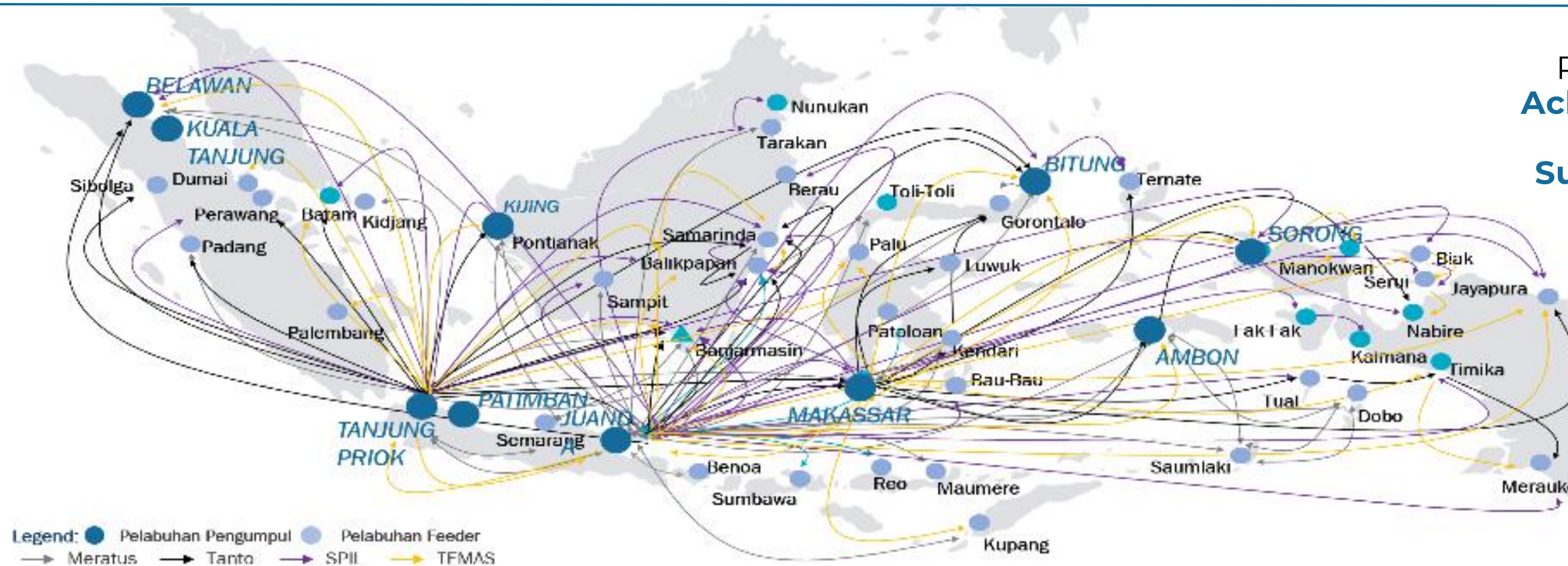


Global Manufacturing Hub

# Indonesian Port Role : as a Gateway

The geographical conditions of Indonesia, dominated by seas, thus **maritime connectivity is a key success factor** for the **economic growth**.

## Key Takeaway: Sea is a Connector, not a Barrier



RPJPN 2025-2045's:  
**Achieving a Sovereign,  
 Advanced, and  
 Sustainable Maritime  
 Nation**



Ports are highly depend to **industry**, as cargo are from and to the hinterland



Ports play a strategic role as **traffic stimulators** in driving industrial growth



Pelindo has an ambition to evolve from port operator to be **traffic stimulator** to empower **economic growth**



# Pelindo Merger



The merger of 4 State Owned Enterprises (SOEs) in Port Services on October 1st, 2021, consequently, leads to the emergence of PT Pelabuhan Indonesia (Pelindo) **as the only SoE in Indonesia for Port Service Business**. Its service territory covers **the whole nation, from the Eastern to the Western region of Indonesia**.



## Before Merger



Managed by four different entities with the same business lines and separation based on Region

## After Merger

### PT Pelabuhan Indonesia (Persero)

Container	Non-container
Logistics & hinterland development	Marine, equipment, & port services
Non-port related business portfolio	
Integrating end-to-end services through business clusters	

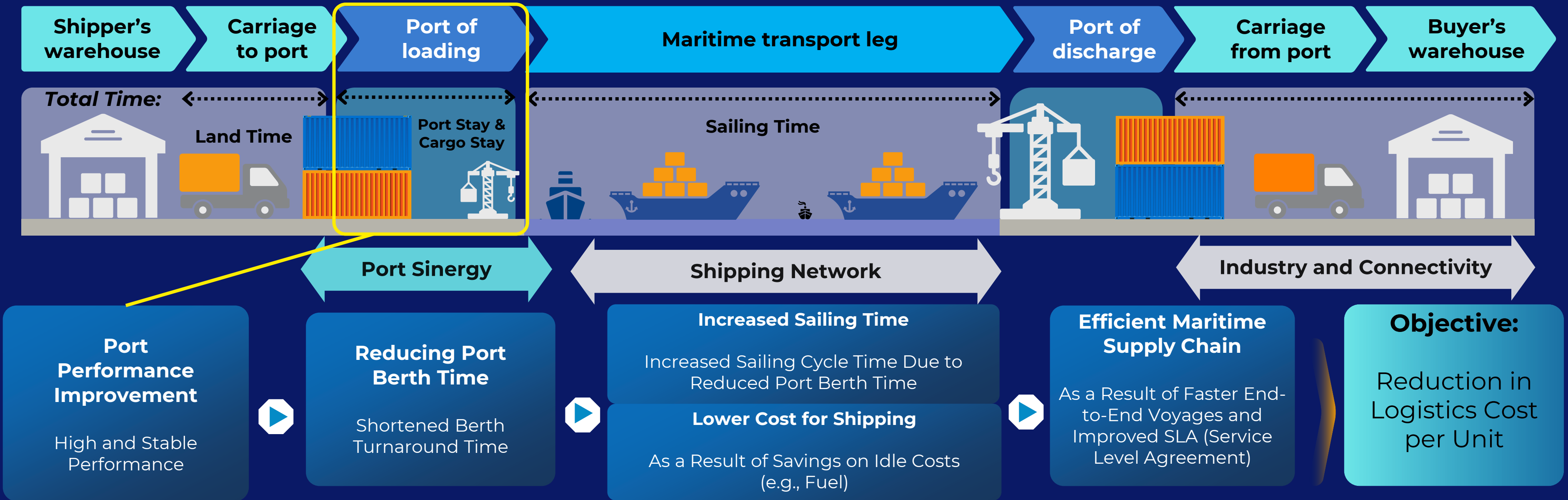




In line with merger objectives, Pelindo continues to implement efficiency initiatives aimed at enhancing maritime connectivity



Ports Have a Critical Role in Maritime Connectivity



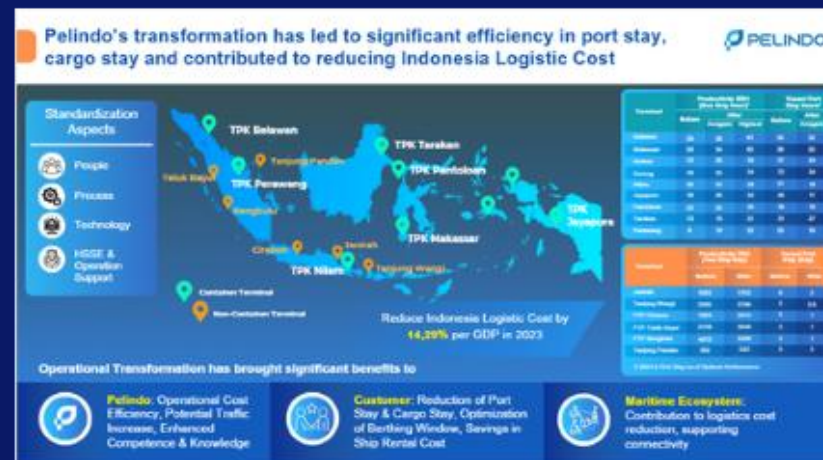


# Pelindo implements operational standardization & digitalization, hub and spoke, and port and hinterland integration to enhance maritime connectivity



There are 3 aspects which become focus of improvement as input for maritime connectivity integration with regional economic growth

1



## Performance Improvement Through Port Standardization

Continuity of Port Standardization could be carried out by:



### Port Operation Transformation

Continues standardization program to the next stage / cycle.



### Port Development

Port development program which included in the Port Master Plan as an additional gateway for trade in Indonesia.

2



## Shipping Network Efficiency

Increase efficiency in the shipping network can be done through:



### Cargo Consolidation in Main Hubs

Disparity in business scale and return cargo, causing shipping lines to absorb the entire transportation cost. Implementation of Hub & Spoke concept is essential to create an efficient shipping network and increase economic of scale through Cargo Consolidation in main hubs

3



## Port and Hinterland Integration

Port integration with the Hinterland Region can be done through:



### Well-Connected Ecosystem

Establish network and integration between industrial areas and ports including transportation mode schemes (multi-modal)



### Competitive Industries Based on Local Resources

Stimulate the development of industry based on competitive local resources to increase port traffic and regional economic growth



# Pelindo operation standardization carries positive impacts for ports, customers and maritime ecosystem



## Standardization Aspects



People



Process



Technology



HSSE & Operation Support



Cabang	Productivity BSH (Box Ship Hour)*			Vessel Port Stay Hours*	
	Before	After Average	Highest	Before	After Average
Belawan	20	38	61	55	32
Makassar	20	34	63	38	22
Ambon	12	26	35	37	24
Sorong	10	25	34	72	24
Nilam	25	35	58	21	18
Jayapura	18	36	52	36	17
Pantoloan	22	25	35	16	15
Tarakan	12	15	21	31	27
Perawang	8	19	32	35	19
Kupang	14	27	49	29	16
Semarang	28	46	79	17	15
Bitung	20	31	40	42	23
TP 1 Zona 3	18	24	44	23	20
TP 2 Domestik	22	32	47	22	19

\*) BSH & Port Stay based on Optimal Performance

## Port Transformation have brought benefits to all stakeholders



**Pelindo:** Cost efficiency, potential traffic growth, competence & knowledge improvement



**Customer:** Shorter port stay & cargo stay, optimized berthing window, ship rental cost efficiency



**Maritime Ecosystem:** Reduced logistics cost, reinforcing port and logistics connectivity

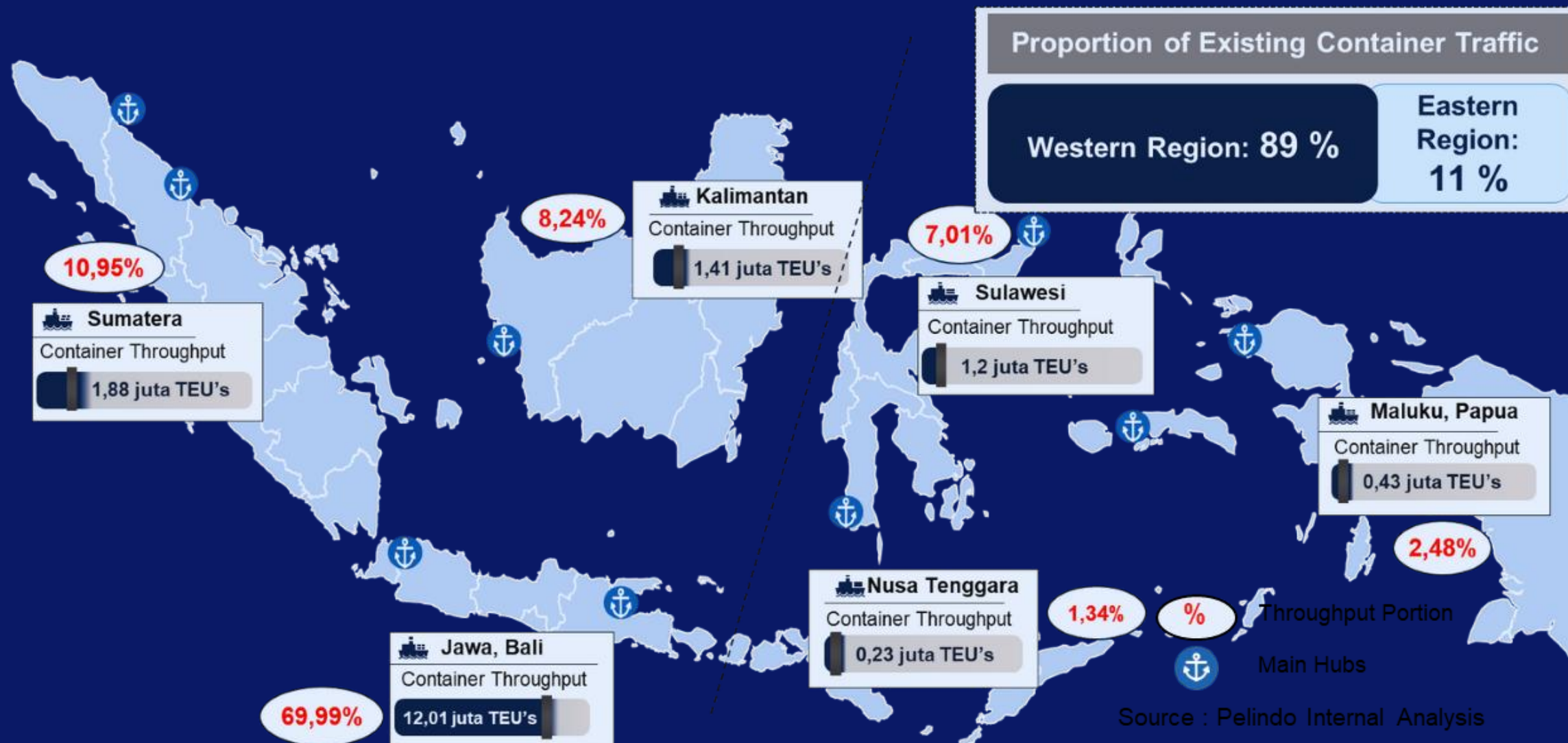


# Improving the connectivity of Indonesian shipping routes through the development of hub and spoke concept

The spatial economic structure of 2023, still dominated by Java, has resulted in cargo disparity and inefficiencies in logistics networks

## Western Indonesia Region

## Eastern Indonesia Region



Implementation of Hub & Spoke concept is essential to create an efficient shipping network



Stimulating economic growth and promoting more equitable economic growth to address Imbalanced Cargo through **creating economic/cargo activities in Indonesia that can generate traffic**

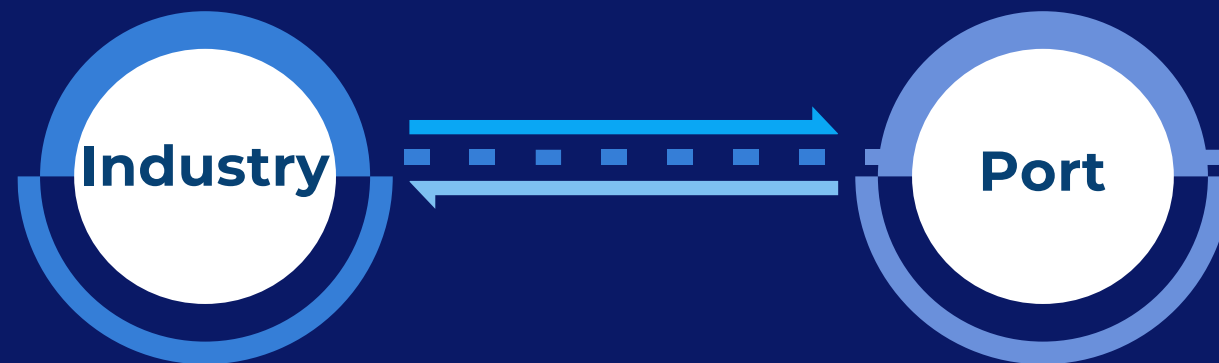


The key strategy is through **Cargo Consolidation** in main hubs to meet economic of scale

- **Imbalanced Trade:** 69.99% of trade flows are concentrated in Java-Bali and 89% in Western Indonesia
- Approximately 75-80%, of container traffic originating from Eastern Indonesia comprises empty containers
- In some areas, return cargo is very low, i.e., for every 20 containers sent from Java, only 1 returns full; the rest are empty
- There is a **disparity in business scale** and return cargo, causing shipping lines to absorb the entire transportation cost



# Strategic alignment between Port Development and Industrial Development is critical to create an integrated ecosystem



## The challenge concerning connectivity between economic regions & transportation access

- ▶ The growth of traffic is driven by industrial and economic growth
- ▶ 'Material' movement is quite costly
- ▶ Regional Connectivity Challenges



Delays  
Trucking



Limitation of  
transport mode



High travel  
time



Limitation of road  
infrastruktur

## Integration between Industrial Areas and Ports will result in significant cost efficiencies

- ▶ Optimizing development through development of integrated economic zone - transportation access
- ▶ Synchronization between the Industrial Master Plan and the Port Master Plan will create an integrated ecosystem

## Critical factors to consider in the synchronization between Ports and Industries:



**Port Location:**  
Proximity to  
resources



Port  
Infrastructure &  
Suprastructure  
Specifications



**Port Size :** Linear  
with industrial  
scale



**Development  
Staging**



**This synchronization will lead to efficiency and effectiveness in the industrial and port environments**



# Pelindo's End-to-End Initiative Digitalization From Seaside and Landside

## Digitalization as Key Enabler for End-to-End Port Services Integration and Efficiency

### Operation - Seaside

- INAPORTNET
- Phinnisi

### Operation - Terminal

- Terminal Operating System (TOS)
- Autogate
- Single Truck ID System STID
- Terminal Booking System (TBS)

### Operation - Landside

- Yard Operating System (YOS)
- Warehouse Management System (WMS)

### Back Office

- Single Enterprise Resource Planning (ERP)



Inaportnet dan Phinnisi : Seaside

PTOS-M: Non [Container Terminal System Operation](#)

TOS Nusantara: [Container Terminal System Operation](#)

Yard Operating System (YOS) and Warehouse Management System (WMS) for Seaside

Single ERP Implementation with standardization, sentralization and automization process to enhance Shared Services Function



All Application developed in house by Pelindo Digital Solution Provider (ILCS)



# Ongoing Partnerships and Potential Collaborations

In Addition to Efficiency Initiatives, Pelindo also Committed to **Carry Out Strategic Projects** to **Increase Business Growth**

## Public Private Partnerships





# Thank You