



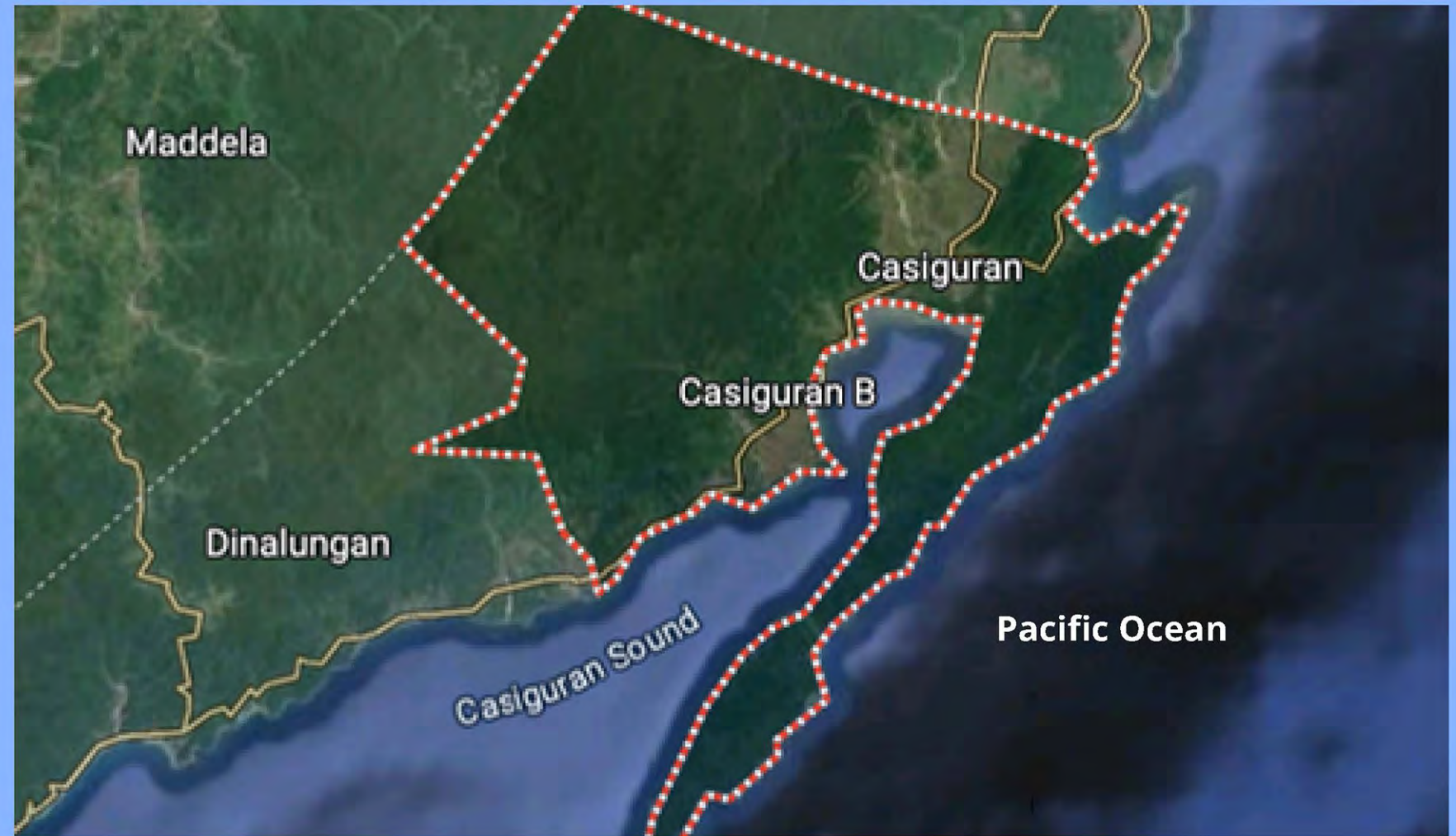
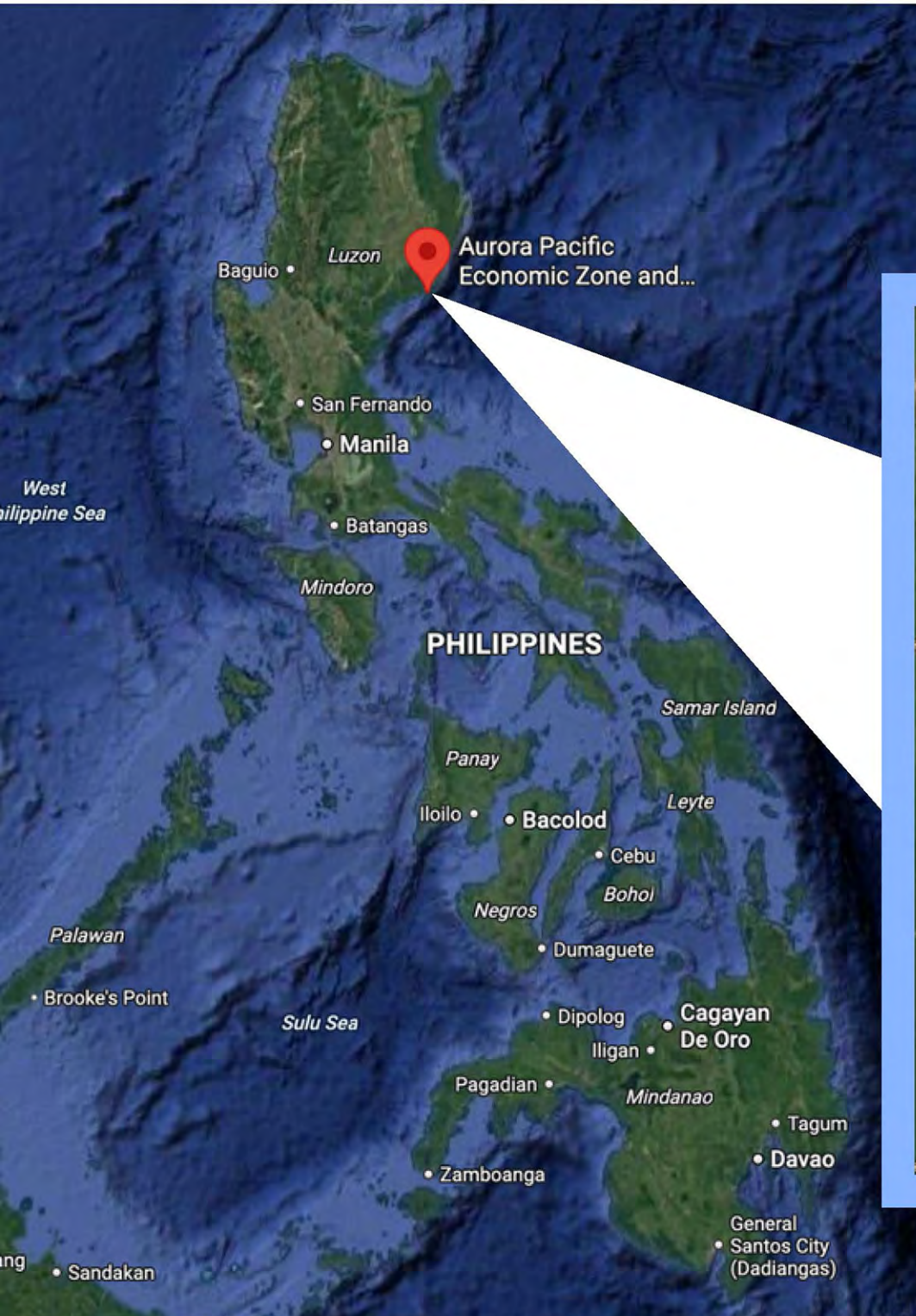
FINDING NEW GATEWAYS

PRESENTED BY
Undersecretary Gil G. Taway IV
President & CEO
Aurora Pacific Economic Zone &
Freeport Authority (APECO)
The Philippines





Aurora Pacific EcoZone
AND FREEPORT AUTHORITY



- APECO is located in Casiguran, Aurora, Philippines



Aurora Pacific Economic Zone & Freeport Authority

- Manages 12,923 hectares of land
- Located in Casiguran, Aurora, Philippines
- Naturally sheltered 10,000-ha deep-water bay



Direct access to the
Pacific Ocean, making it
the **Gateway to the Pacific**

WHERE WILL THE NEXT GATEWAY BE?





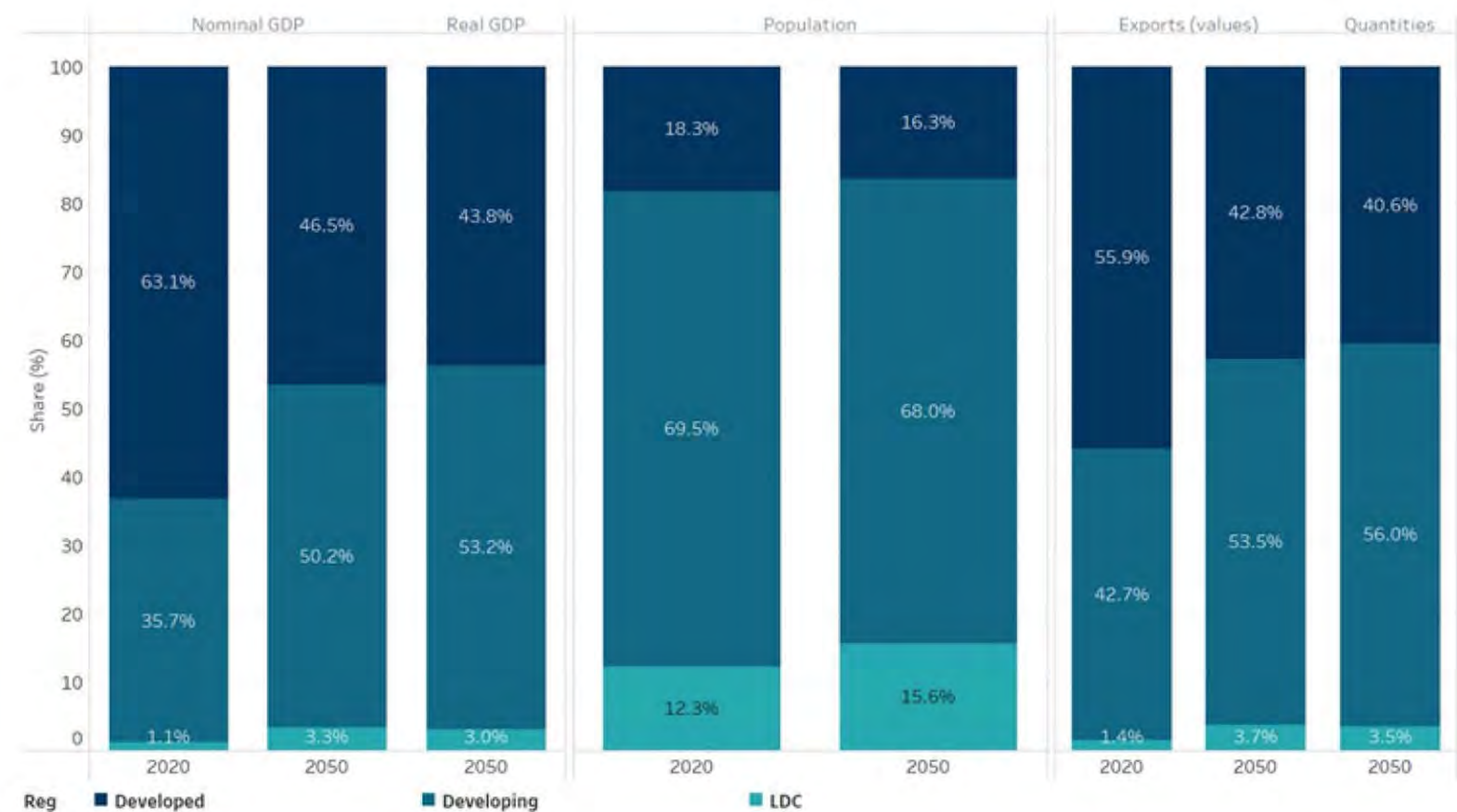
FUTURE OF LOGISTICS

- Faster supply chain
- More resilient
- Respond to the growing global trade



By 2050, developing countries will account for world's biggest share in GDP, population, and exports

"How Will Global Trade Patterns Evolve in the Long Run", WTO (2023)



Developing countries' share in global trade by 2050

37%

increasing by



18

percentage points

Share of aggregate regions in global GDP, Population and Exports (2020-2050), (WTO)

Southeast Asia's average GDP and exports growth between 2020 and 2050 surpass global growth

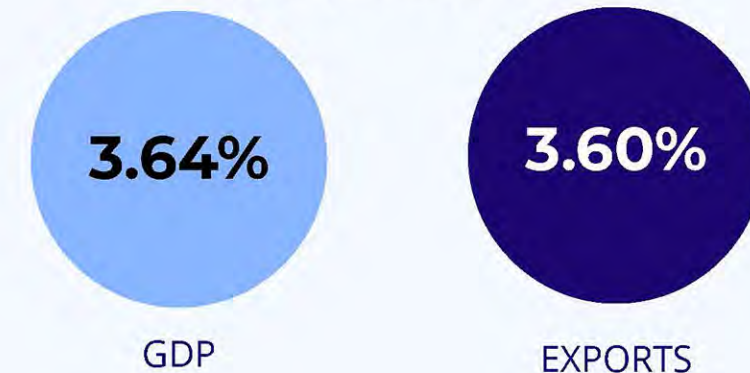
"How Will Global Trade Patterns Evolve in the Long Run", WTO (2023)

Region	GDP	Population	Unskilled	Skilled	Exports
Asia LDC	4.70	0.55	0.65	3.41	4.51
Australia	2.04	1.09	0.12	1.98	2.18
Brazil	1.76	0.34	-0.15	1.91	2.27
Canada	1.72	0.81	-0.41	1.13	2.47
China	3.20	-0.23	-0.88	2.29	4.17
European Union	1.54	0.08	-1.03	1.17	1.88
EFTA	1.56	0.66	-0.33	1.65	1.70
United Kingdom	1.62	0.49	-0.39	1.63	1.87
Indonesia	4.13	0.40	0.49	3.52	5.09
India	4.61	0.75	0.62	3.30	5.79
Japan	0.61	-0.45	-2.09	0.41	1.78
Republic of Korea	1.83	-0.19	-2.62	0.77	3.07
Latin America	2.62	0.60	0.41	2.70	2.86
Mexico	2.35	0.60	0.50	3.02	2.21
Middle East and North Africa	3.09	1.10	0.87	3.64	2.74
Other Asian countries	2.98	1.11	1.21	2.84	3.44
Rest of World	2.67	0.12	-0.22	1.46	2.69
Russian Federation	1.80	-0.10	-0.82	0.64	2.16
Kingdom of Saudi Arabia	2.50	1.56	-0.07	2.91	1.72
Southeast Asia	3.64	0.60	-0.02	2.66	3.60
Sub-Saharan Africa LDC	5.48	1.84	2.87	5.60	5.63
Sub-Saharan Africa other	4.98	1.83	2.14	5.11	5.13
Türkiye	2.74	0.65	0.51	3.21	2.68
United States of America	1.51	0.56	-0.10	1.32	2.41
South Africa	2.39	0.63	0.67	2.63	3.08
Global	2.72	0.62	0.08	2.44	3.09

Average growth rates of key indicators, by region (2020-2050, %), (WTO)

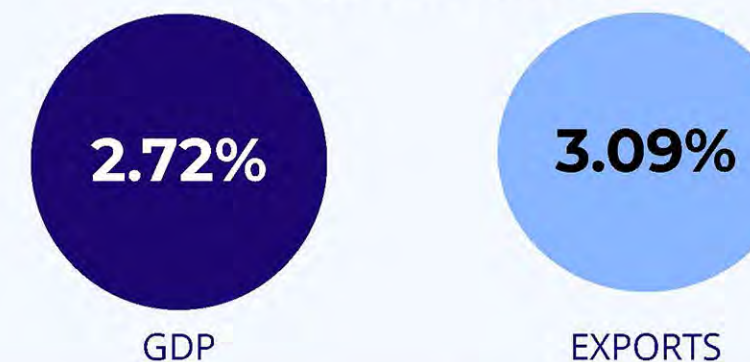
Southeast Asia

Average growth 2020-2050



World

Average growth 2020-2050



In 2024, ASEAN's merchandise trade rose 8.8% to USD3.84 trillion. Top export markets are APEC economies.

ASEANstats.org



ASEAN's top 10 export markets in 2024

- 1. United States
- 2. China
- 3. EU
- 4. Japan
- 5. Hong Kong
- 6. South Korea
- 7. India
- 8. Taiwan
- 9. Australia
- 10. United Kingdom

East and Southeast Asian ports are among the top 30 busiest ports across the globe

Alphaliner

Recorded double-digit growth of 11.5% (Port Klang) up to 59.3% (Ningbo-Zhoushan) between 2019 and 2025.

Top 30 ports in 2025 (2024 ranking in brackets)

Rank (y-o-y)	Port Name	Country	2025	2024	Growth 25/24 %		2019	Growth 25/19 %
1 (1)	Shanghai	China	55,062,000	51,508,000	6.9%	↑	43,303,000	27.2%
2 (2)	Singapore	Singapore	44,663,699	41,124,045	8.6%	↑	37,195,636	20.1%
3 (3)	Ningbo-Zhoushan	China	43,870,000	39,300,800	11.6%	↑	27,535,000	59.3%
4 (4)	Shenzhen	China	35,410,000	33,398,600	6.0%	↑	25,771,700	37.4%
5 (5)	Qingdao	China	32,890,000	30,870,000	6.5%	↑	21,010,000	56.5%
6 (6)	Guangzhou	China	27,680,000	26,070,000	6.2%	↑	23,236,200	19.1%
7 (7)	Busan	S Korea	24,881,704	24,402,022	2.0%	↑	21,992,000	13.1%
8 (8)	Tianjin	China	24,032,800	23,292,500	3.2%	↑	17,300,700	38.9%
9 (9)	LA/LB	US	20,120,917	19,947,077	0.9%	↔	16,969,666	18.6%
10 (10)	Jebel Ali (Dubai)	UAE	15,552,000	15,536,000	0.1%	↔	14,111,000	10.2%
11 (11)	Port Kelang	Malaysia	15,138,772	14,644,527	3.4%	↑	13,580,717	11.5%
12 (12)	Rotterdam	Netherlands	14,250,000	13,822,000	3.1%	↑	14,810,000	-3.8%
13 (16)	Tanjung Pelepas	Malaysia	14,028,376	12,253,309	14.5%	↑	9,077,485	54.5%
14 (14)	Antwerp	Belgium	13,610,000	13,517,000	0.7%	↔	11,860,204	14.8%
15 (13)	Hong Kong	China	12,944,000	13,688,000	-5.4%	↓	18,303,000	-29.3%
16 (15)	Xiamen	China	12,507,700	12,255,700	2.1%	↑	11,122,180	12.5%
17 (17)	Tanger Med	Morocco	11,106,164	10,241,392	8.4%	↑	4,801,710	131.3%
18 (18)	Laem Chabang	Thailand	10,452,400	9,554,675	9.4%	↑	7,980,560	31.0%
19 (20)	Beibu Gulf	China	10,060,000	9,020,000	11.5%	↑		n.a.
20 (22)	Ho Chi Minh City	Vietnam	n.a.	9,158,200	n.a.		6,848,360	n.a.
21 (21)	NY/NJ	US	8,897,531	8,698,526	2.3%	↑	7,471,131	19.1%
22 (19)	Kaohsiung	Taiwan	8,885,854	9,228,418	-3.7%	↓	10,428,634	-14.8%
23 (24)	Hamburg	Germany	8,364,000	7,795,313	7.3%	↑	9,282,012	-9.9%
24 (25)	Colombo	Sri Lanka	8,301,210	7,792,069	6.5%	↑	7,228,337	14.8%
25 (23)	Mundra	India	n.a.	8,231,000	n.a.		4,732,699	n.a.
26 (27)	Nhava Sheva	India	7,944,257	7,052,689	12.6%	↑	5,100,889	55.7%
27 (28)	Jakarta	Indonesia	7,880,000	7,600,000	3.7%	↑	6,802,200	15.8%
28 (26)	Cai Mep	Vietnam	n.a.	7,440,000	n.a.		n.a.	n.a.
29 (29)	Rizhao	China	7,370,000	6,710,000	9.8%	↑	4,520,000	63.1%
30 (30)	Lianyungang	China	7,160,000	6,690,700	7.0%	↑	5,570,000	28.5%

ALPHALINER

COMPLEX GEOPOLITICAL ENVIRONMENT

Recent incidents and tensions that have disrupted global supply chain:

- Ongoing war in Strait of Hormuz
- Geopolitical tension in the South China Sea
- Blockage in Suez Canal during pandemic



When routes fail, what's your backup?



The answer lies in the Pacific.

- ASEAN must invest more seriously in Pacific-facing maritime infrastructure
- Future business expansion should also be positioned in economic zones facing the Pacific





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APECO and CASIGURAN INTERNATIONAL NEW PORT BUSINESS CASE FOR ASEAN

Closer facilities to top trading partners

Closer to U.S., China, Japan, South Korea, Taiwan, Australia, and other APEC economies

Redundancy Node

Alternate route when the main shipping lanes close due to geopolitical tensions, unexpected circumstances, among others

Supply chain diversifi- cation

Supply chain diversification. A new location for cargo consolidation, processing, storage, and redistribution



APECO AS A FUTURE ASIA-EUROPE GATEWAY

Once the “Golden Waterway”, or the Arctic Route, becomes commercially viable at scale:

- APECO could become the gateway of ASEAN for Europe via the Arctic Route and the Pacific
- Reduce dependence on the Suez Canal
- Reshape Asia-Europe trade





INVEST BEFORE THE TRADE ARRIVES

01

ASEAN's economic growth is creating increasing pressure on our existing maritime gateways, making **complementary infrastructure more important than ever.**

02

Global supply chains are becoming more complex as geopolitical uncertainties reshape international trade.

03

The future of shipping may once again be transformed by **emerging trade routes**, placing even greater strategic value on **gateways facing the Pacific.**





**NEXT GENERATION PORTS
ARE PACIFIC-FACING.**

PILIPINAS
MAKE IT HAPPEN
BAGONG APECO



Aurora Pacific EcoZone

AND FREEPORT AUTHORITY



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GATEWAY TO THE PACIFIC!