

Strengthening Maritime Connectivity through Port Transformation

Adapting to Current Uncertainties, Addressing Current Disruptions in Cargo Movements and Forecasting the Future of Global Trade Routes and its Implications for ASEAN Ports

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ASEAN Ports and Logistics 2026
July 7-9, 2026



About Pelindo



Pelindo (PT Pelabuhan Indonesia) is a state-owned enterprise in Indonesia that operates and manages commercial ports across the country. Formed through the integration of four previously separate port operators, Pelindo plays a strategic role in supporting national logistics, trade connectivity, and economic growth.



74 Branches

122 Ports

55 Subsidiaries / Entities

OPERATION SCALE 2025



Container Throughput

19,8 Million Teus



Cargo Throughput

195.2 Million Tonnes



Passengers Traffic

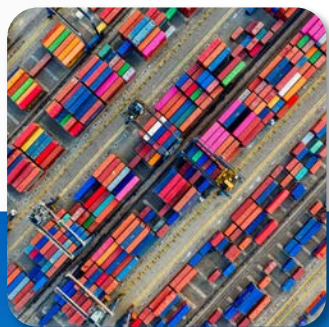
20,4 Million Passengers



Vessel Traffic

1,423 Million GT

Pelindo – Connecting Indonesia through an integrated maritime ecosystem.



CONTAINER SERVICES

PT Pelindo Terminal Petikemas

Loading and unloading service for containerized goods from ships to delivery. The scope of the business include:

- Stevedoring
- Haulage
- Wharf Services
- Receiving/Delivery
- Stacking Services



NON CONTAINER SERVICES

PT Pelindo Multi Terminal

Loading and unloading service for non-container goods from ships to delivery. The scope of the business include:

- Liquid bulk terminal services
- Dry bulk terminal services
- Vehicle terminal services
- Special terminal services
- Multipurpose terminal services
- Terminal for Own Needs (TUKS) services



LOGISTICS & HINTERLAND DEVELOPMENT

PT Pelindo Sinergi Lokaseva

A support service from hinterland to enhance port performance. The scope of the business include:

- Warehousing & Storage
- Multimodal Transportation
- Connectivity
- port-led Industrial estate
- Terminal Support Estate
- Property Management
- Marina and Cruise Ecosystem



MARINE & EQUIPMENT

PT Pelindo Jasa Maritim

Ship operational services starting from entering to exiting the port. The scope of the business include:

- Pilotage Services;
- Towage Services;
- Mooring Services;
- Utilities Services

In addition, there are equipment, utilities, dredging, and energy services.



Global Trend



The World today operates under continuous uncertainty



Geopolitical Conflicts

Geopolitical tensions impact global economy, US-Iran Conflicts, Gaza aid funding shortfall, violence in South Sudan



Changing Shipping Routes

Trade to and from the Middle East would be disrupted. This leads to route shifts via the Cape of Good Hope that increase voyage distances and sailing days.



Energy Volatility

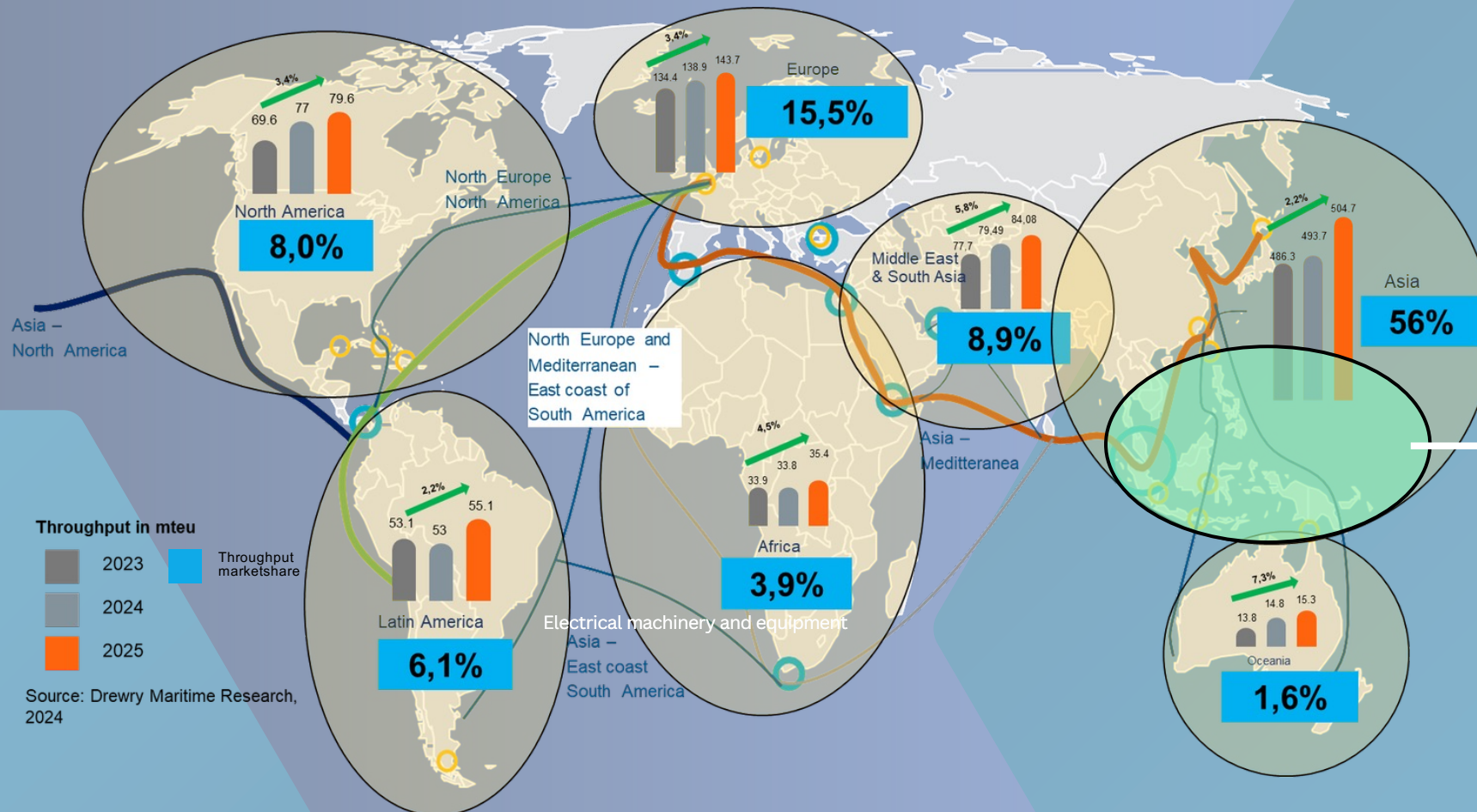
Geopolitical shocks and fluctuating fossil fuel supplies are spilling over into related sectors—such as base metals and fertilizers—driving global inflation higher



Trade Policy Shifts

The shifting trade policy presents several concerns such as tariff volatility and enforcement, supply chain fragmentation, regulatory compliance strain, and raising costs

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



Source: Drewry Maritime Research, 2024

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

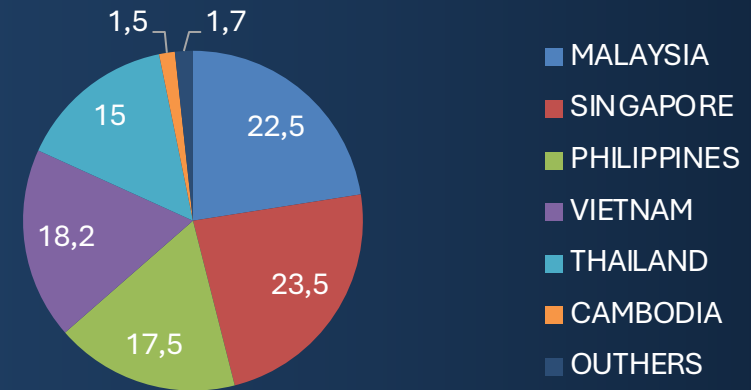
 Global Manufacturing Hub

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



Indonesia's Export Value Percentage to ASEAN (2025)



Source: BPS-Statistics Indonesia and BPS Foreign Trade Statistics 2025

Top Export Commodity to ASEAN Countries 2025



Mineral fuels



Animal/vegetable fats and oils



Iron and steel

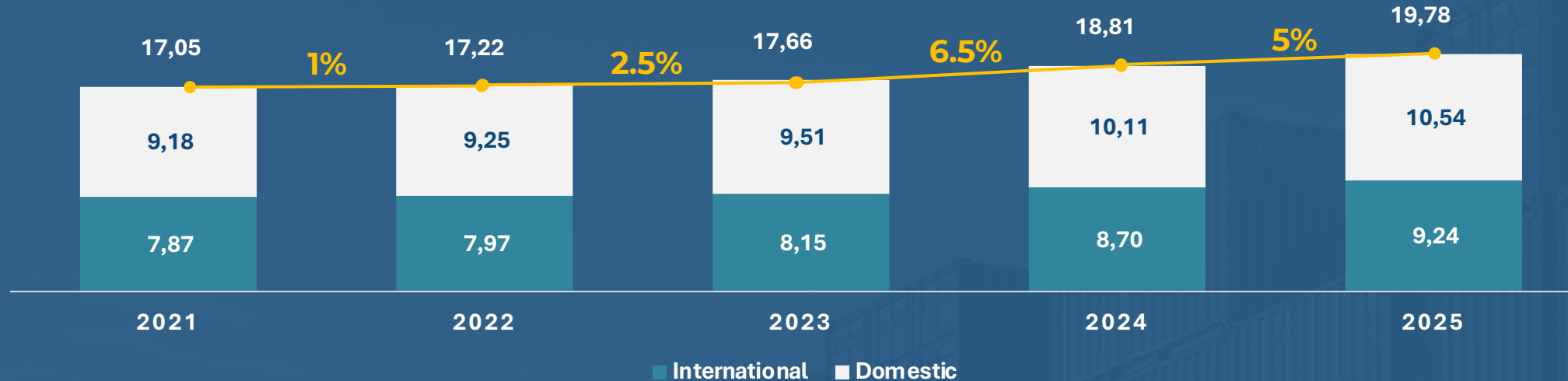


Electrical machinery and equipment



Vehicles and parts

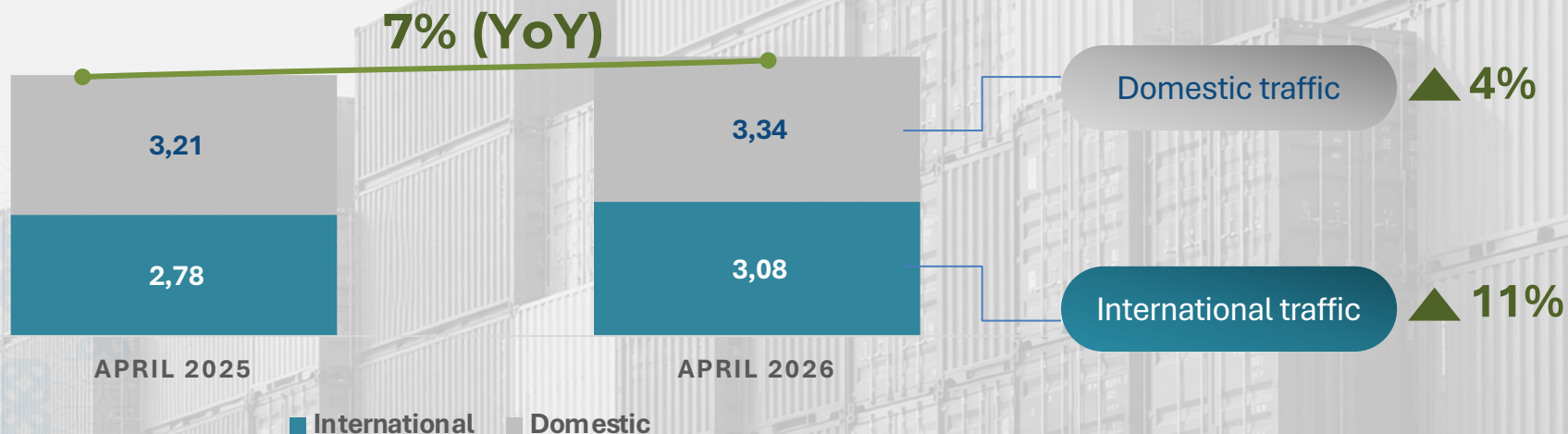
Container Traffic (Million TEUs)



CAGR
3,78 %

2026

Container Traffic up to April 2026 : 6,4 M TEUs



- Pelindo's container throughput recorded positive growth, driven by **strong domestic economic activity** and **sustained growth in Indonesia's international trade**.
- Growth in international throughput was supported by **rising containerized import volumes**, while the **predominance of intra-Asia trade** has enabled Pelindo to **remain relatively resilient** against global market volatility

Building Resilience to Global Disruption



Enhancing Service Performance and Port-Industry Integration

1 Enhancing the performance of services



- ✓ Operational Services Digitalization and technology adoption
- ✓ Implementation of integrated data through Maritime Ecosystem Platform Development

2 Integration of Ports and Industrial Estate



- ✓ Activate industrial estate as cargo generators to stabilize against global uncertainty.



Expected Benefits

- Improve Port Performance
- Enhance Shipping Network Connectivity & Efficiency
- Reduce National Logistics Costs
- **Promote Integrated Logistics Growth, Boosting Indonesia's Economic Contribution**

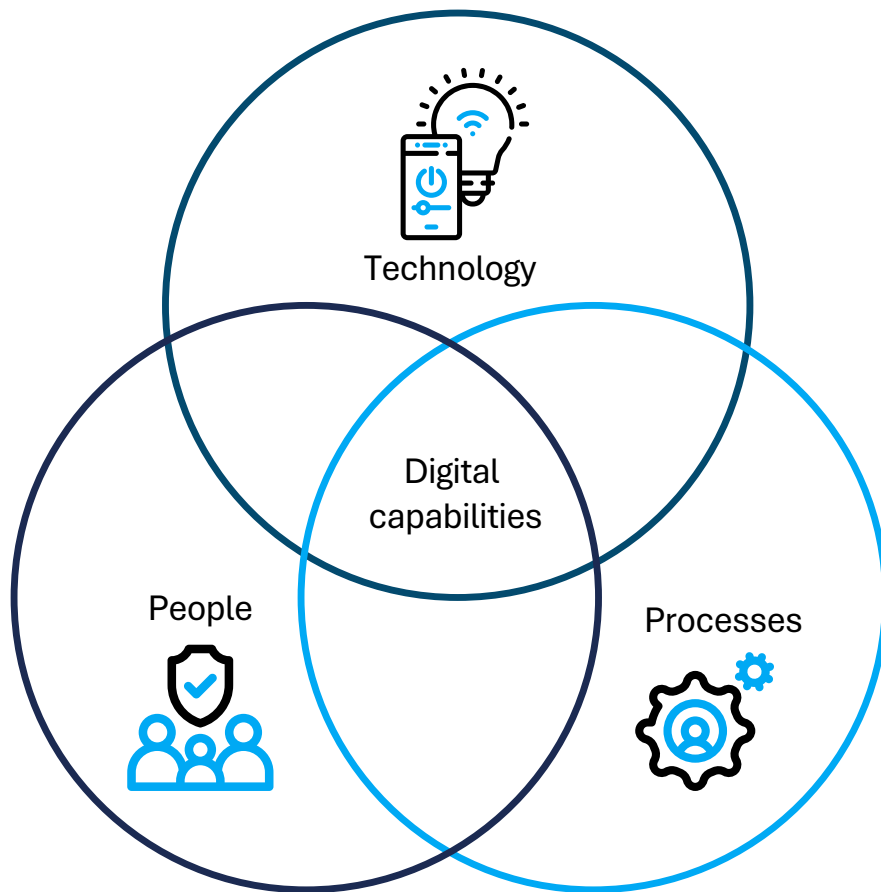
Enhancing the Performance of Services

(through Digital Transformation)

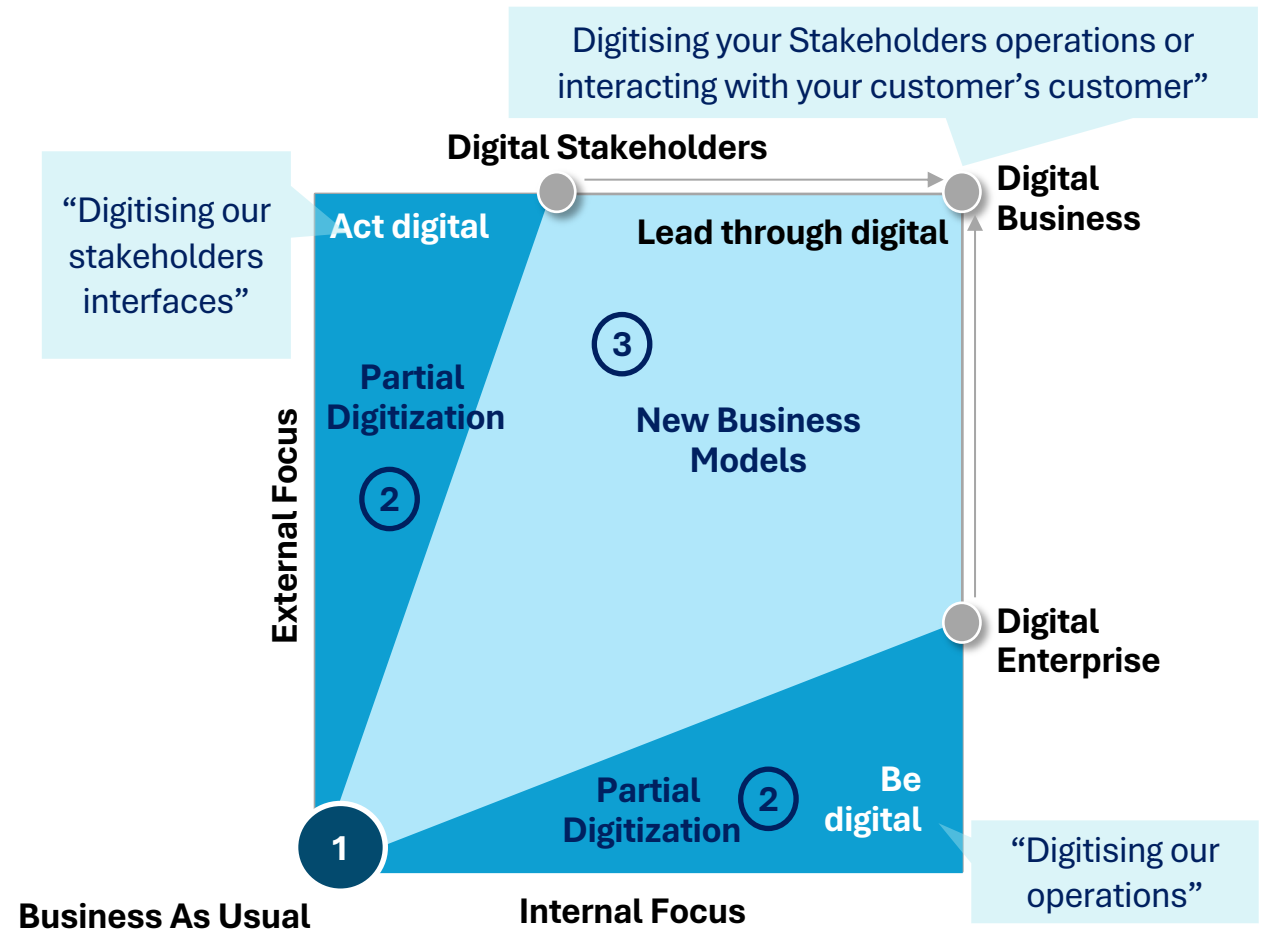


To achieve the digitalization of port services, comprehensive change management involving all stakeholders and customers is needed

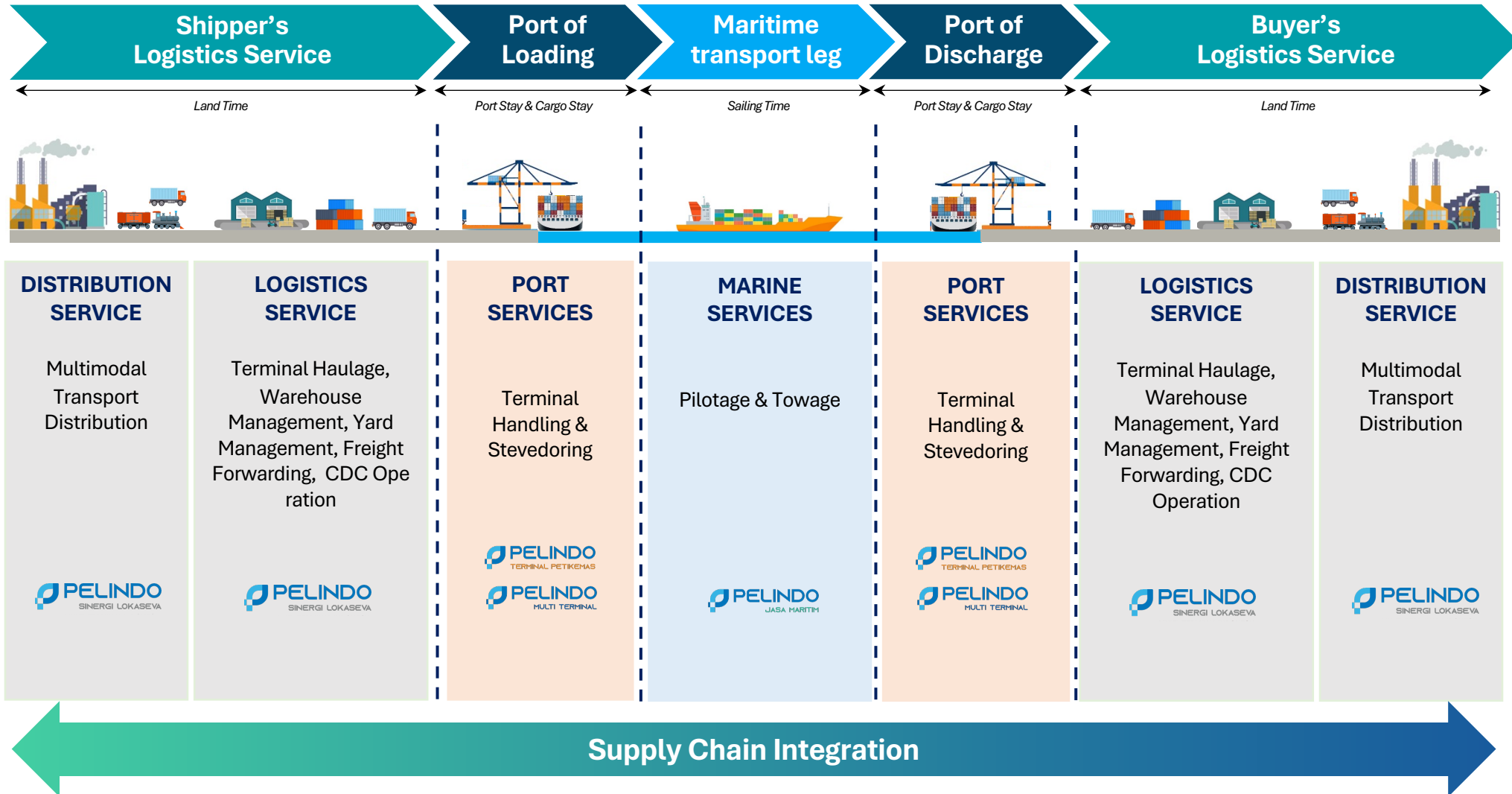
Building Blocks



Go beyond the gate



Digitalization to Strengthen Logistic Supply Chain



Improvement of Port and Logistic Services

Operation Standardization

Digitalization

Connectivity of Ports and Hinterland

Port & Logistic Service integration

Technology Adoption to Support Logistics Service Orchestration



Supported by:



Vessel Management System (VMS)



CONSENSING
Submitting PKK (Integration with INAPORTNET), Filing PPKB, BPK and OP.

VALIDATING
Validating the submissions made which include validation of service requests and sum assured.



PLANNING
Planning for automated resource optimizing services that balance load resources, and also adjust for abnormalities that occur in the field.

ORDER DISPATCHING
Scout, Delay, and Mooring SPK Printing (Integration with INAPORTNET).

Terminal Operation System (TOS)



VESSEL MANAGEMENT
Vessel particular data management and ship visit data management

3D SMART VISION
3D Visualization to monitor goods operation activities at the wharf and the field



DYNAMIC BERTHING WINDOW
Berthing window management with dynamic user experience

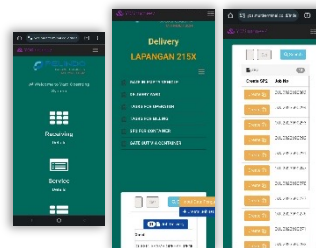
STORAGE AREA VIEW
Real-time visual monitoring of storage and field capacity



Warehouse Management System (WMS)



Yard Operating System (YOS)

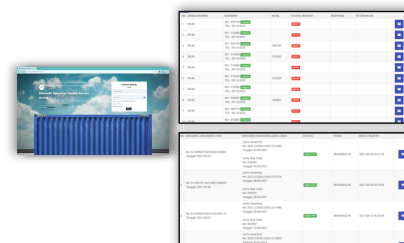


Customer Portal

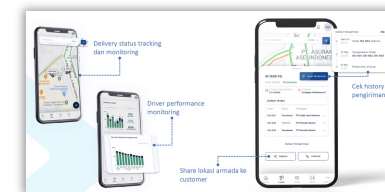


**Continues Improvement*

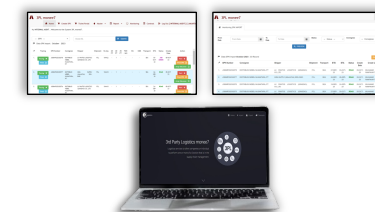
Behandle Operating System (BOS)



Truck Management System (TMS)



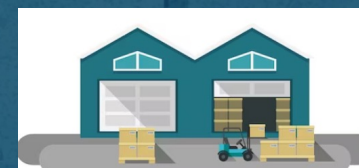
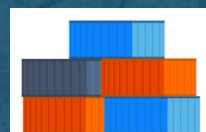
3PL System (FF)



MARINE SERVICE

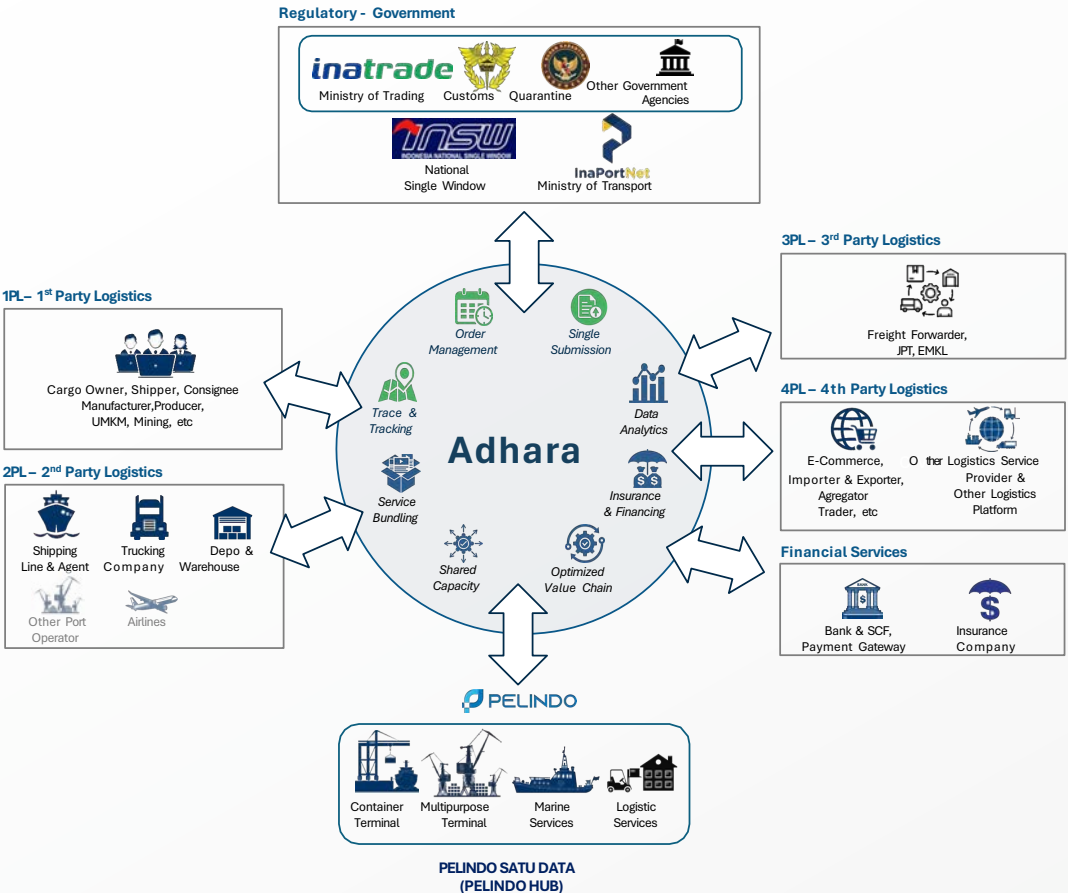
PORT SERVICES

LOGISTICS SERVICE

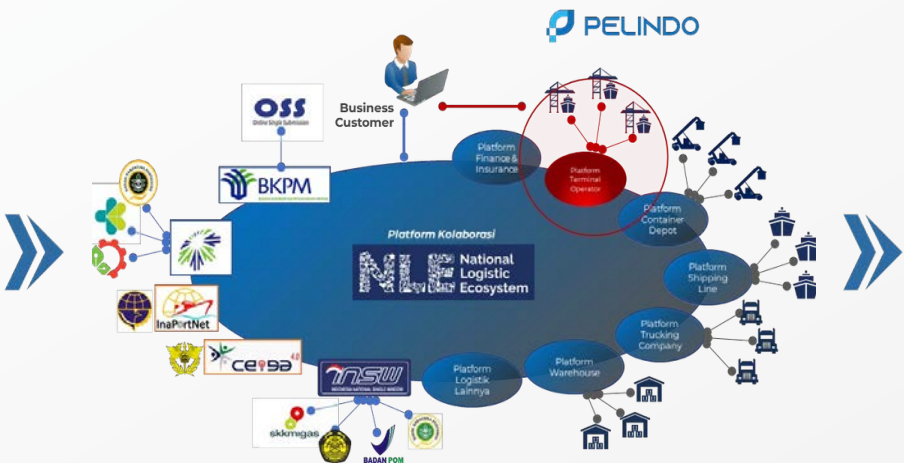


Pelindo plans to build Maritime Ecosystem Platform to support One Maritime Data as the initiatives of Indonesia Government

Adhara



NLE



SDI



A national data governance initiative designed to establish high-quality, standardized data that is easily accessible and shareable across central and local government agencies.

Integration of Ports and Industrial Estate





Integration between Industrial Estates and Ports will create significant cost efficiencies

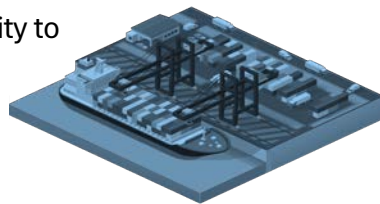
▶ Optimizing development by developing integrated economic zones with access to connectivity.

▶ Synchronization between the Industrial Master Plan and the Port Master Plan so as to create an integrated ecosystem

Important aspects to consider in the synchronization between Port and Industry:



Port Location: Proximity to resources



Port Size:
Linear with the Industry Scale



Port Infrastructure & Superstructure Specifications



Development staging

This synchronization will create efficiency and effectiveness in the industrial and port environment.

Pelindo Drives Domestic Industrial Growth Through Port and Industrial Estate Integration



Our role in creating an integrated ecosystem that strengthens Indonesia's industrial growth, improves supply chain connectivity, and delivers sustainable logistics cost efficiencies

Integration of Ports and Industrial Estates Initiatives

Kuala Tanjung Industrial Estate



New Priok Port Ecosystem

Pelindo is developing Kalibaru Ecosystem as an integrated port ecosystem which provide container terminal and product terminal, equipped with Reserved Area as Terminal Support Facilities providing services of handle, Import CFS, and Laden Container Yard. The ecosystem is further strengthened by seamless hinterland connectivity through NPEA and NPSA, which linked to Tanjung Priok Access Toll Road and Cibitung Cilincing Toll Road, enabling direct access to key industrial corridors in East Jakarta, Bekasi, Karawang, and surrounding regions.

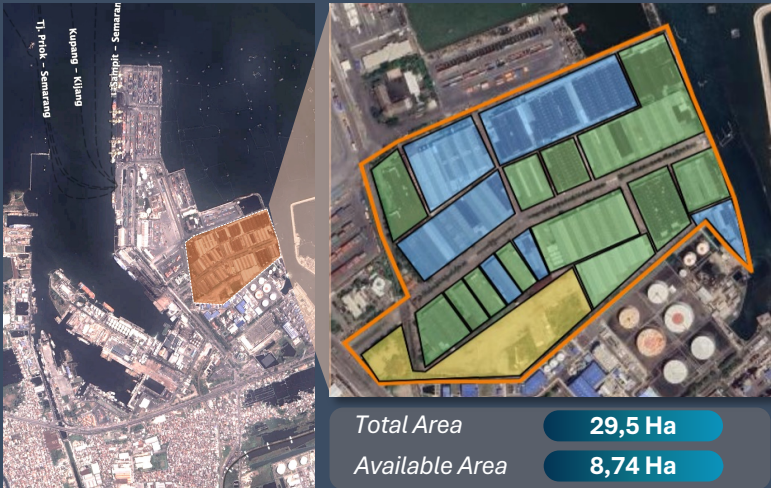
Kijing Port-Supporting Area



Java Integrated Industrial & Port Estate (JIPE)



Tanjung Emas Export Processing Zone (TEPZ)





“So, where do we go from here?”

Thank You



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Pelindo Tower

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Jakarta Utara, Daerah Khusus Ibukota Jakarta

Development of Kuala Tanjung Industrial Estate (KIKT)

KIKT is strategically located near to Kuala Tanjung Port, which is equipped with both container terminal, general cargo and liquid bulk terminal, also has access to Kuala Tanjung Toll Road.



A 1 km from Kuala Tanjung Multipurpose Deep Sea-Port

B 3,7 km from Kuala Tanjung Toll Road

C 3 km from Lalang Train Station

Industrial potential



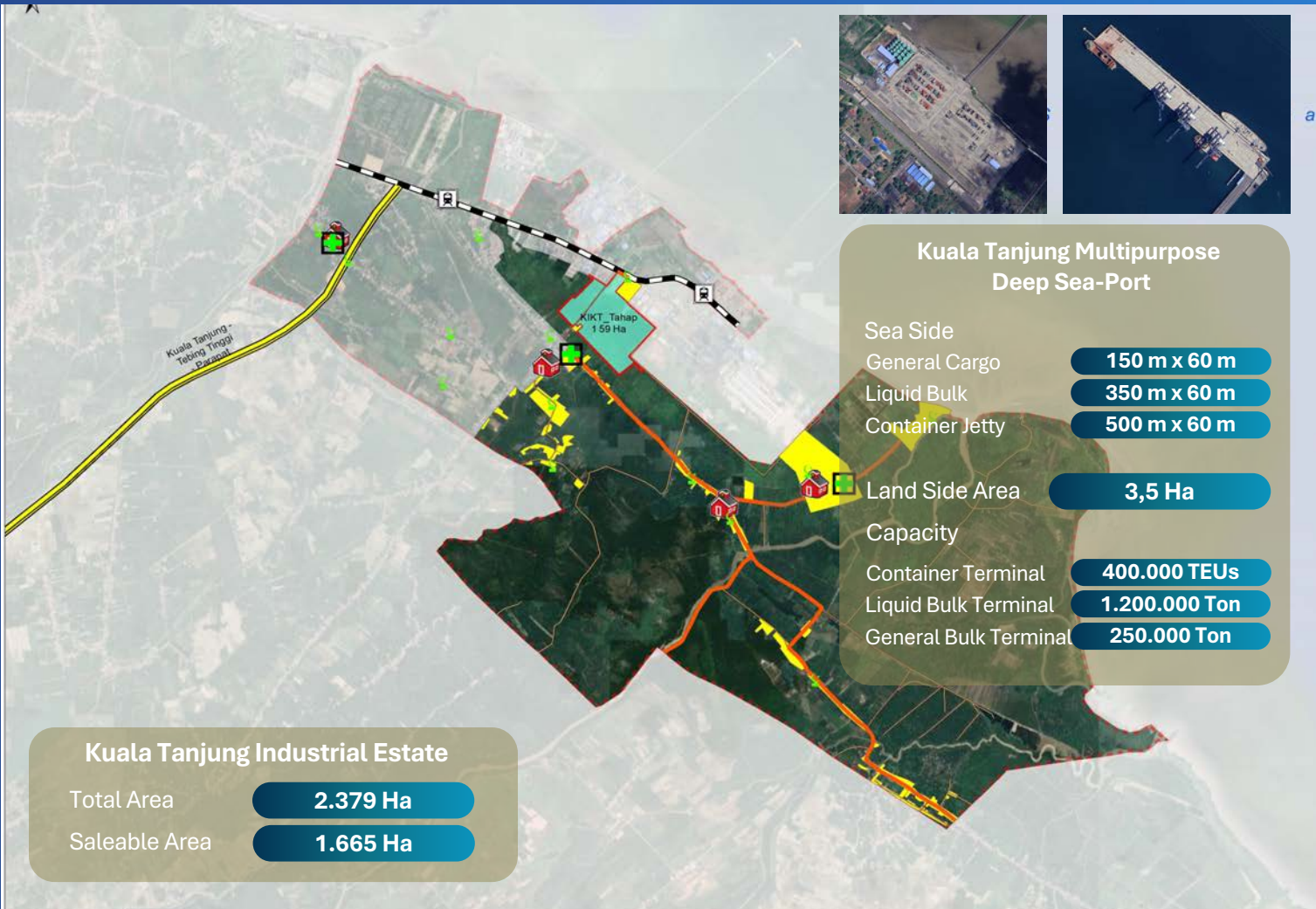
Crude Palm Oil

- Oleo-Chemical
- Palm Oil
- Biofuel



Rubber

- Tire
- Automotive parts
- Gloves



Kuala Tanjung Multipurpose Deep Sea-Port

Sea Side	
General Cargo	150 m x 60 m
Liquid Bulk	350 m x 60 m
Container Jetty	500 m x 60 m
Land Side Area	3,5 Ha
Capacity	
Container Terminal	400.000 TEUs
Liquid Bulk Terminal	1.200.000 Ton
General Bulk Terminal	250.000 Ton

Kuala Tanjung Industrial Estate

Total Area	2.379 Ha
Saleable Area	1.665 Ha

New Priok Port Ecosystem



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Terminal



New Priok Port has been planned to operate CT 2 by 2028 and to operate all 3 Container Terminals and 2 Product Terminal by 2045.

Reserved Area



The Reserved Total Area comprises approximately 33 ha of reclaimed land adjacent to Kalibaru Terminal, designated for supporting facilities to enhance terminal operations.

Integrated Logistic Center



The Integrated Logistics Center will strengthen the Kalibaru logistics ecosystem by serving as a second-line logistics hub, enhancing connectivity with the Marunda Industrial Area, and capturing inbound and outbound container traffic.

Kijing Port-Supporting Area Development

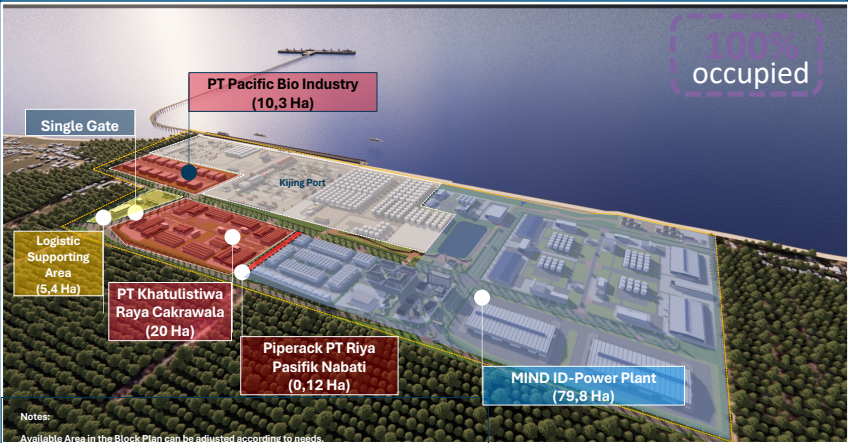
PT Pelindo is developing Kijing Port, which is directly integrated with 131,5 Ha Supporting Area and connected to its Hinterland, supporting three major industrial commodity clusters



Kijing Port is located in Kijing, Mempawah Regency, West Kalimantan, approximately 80 km from Pontianak Port. Strategically positioned along the international shipping route through the Malacca Strait, the port serves as a key gateway for regional and global trade.

The hinterland of Kijing Port encompasses Mempawah Regency and the broader West Kalimantan region, forming an integrated logistics and economic catchment area. The region holds significant industrial potential, particularly in bauxite, crude palm oil (CPO), timber, rubber, and fisheries.

Connectivity between Kijing Port, the Supporting Area, and its hinterland will be further strengthened through the development of the Pontianak–Mempawah Toll Road and the planned railway network, enhancing the efficiency of cargo movement and supporting future industrial growth



jiipe is the first integrated industrial area in indonesia that combines a port, industrial area, and commercial area.



The Java Integrated Industrial and Ports Estate (JIPE) covers a total area of 3,000 hectares. Located in Gresik, JIPE will become a key strategic industrial hub in Indonesia and the Asia Pacific region.

- 

1

Industrial Estate

1761 Ha


- 

2

Port Estate

406 Ha


- 

3

Residence and Commercial Estate

800 Ha



JIPE provides several significant benefits:



JIPE serves as a leading example of successful port–industry integration in Indonesia.



Attracting USD 5.6 Billion in Investment



Strengthened Downstream Industrial Ecosystem



Increase in Workforce to 24,000 People

Pelindo also plans to develop the Tanjung Emas Export Processing Zone (TEPZ) in Semarang

Positioning TEPZ as Central Java's Export Hub, with an existing tenant base dominated by international cargo owners.

Potential Services



Depo/CCDC



Bonded Warehouse



Cutsoms Clearance



Occupied



**Available
(87.430 m2)**



Paving Yard

Total Area: **25,9 Ha**

Bonded Zone: **13,3 Ha**

Logistic Center : **12,5 Ha**