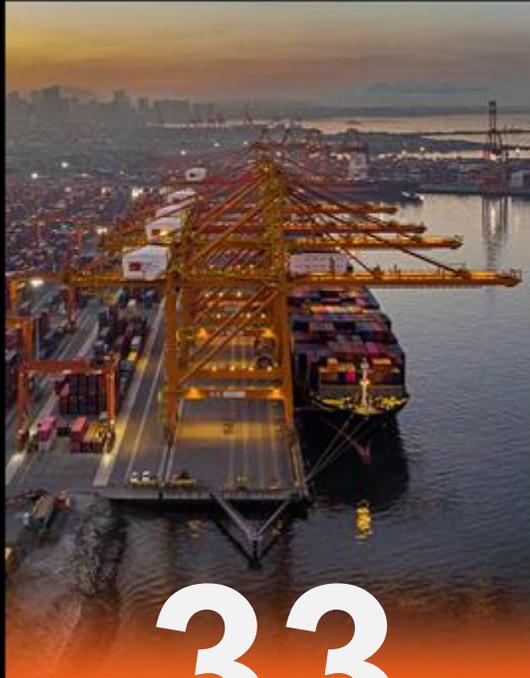




Philippine Ports and Logistics - ICTSI Philippines
Manila, March 2026

Driver of positive change and sustainable growth



33

TERMINALS

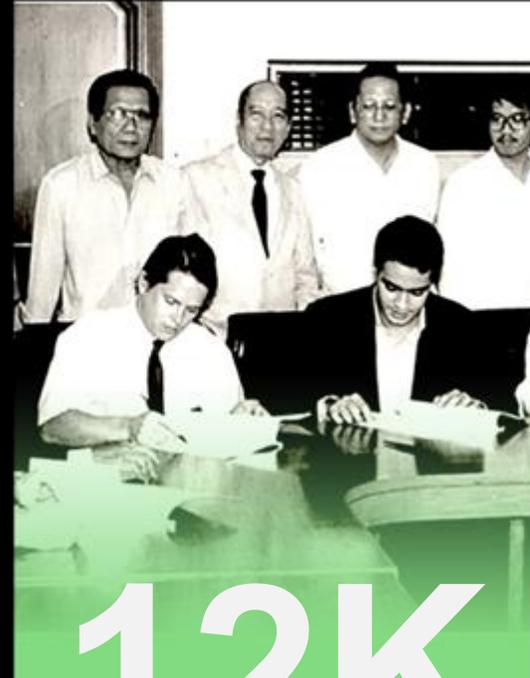
Pure play, origin and destination (O&D) container terminal operator



19

COUNTRIES

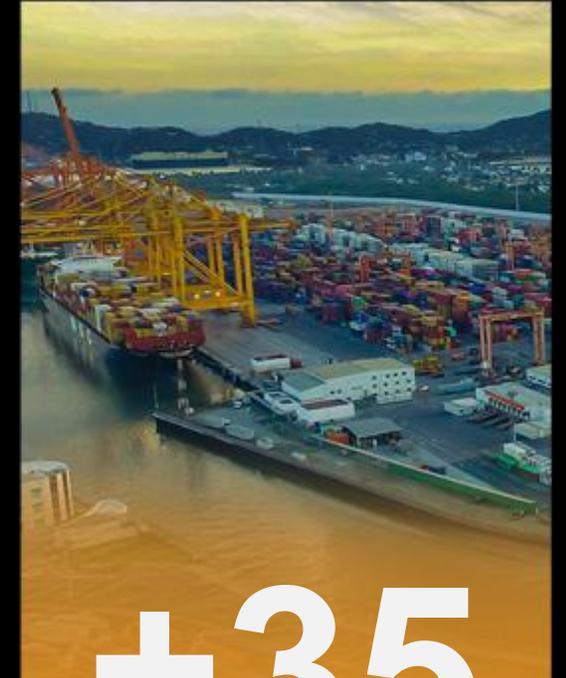
Diversified global portfolio across six continents



12K

JOBS CREATED

Highly experienced international team

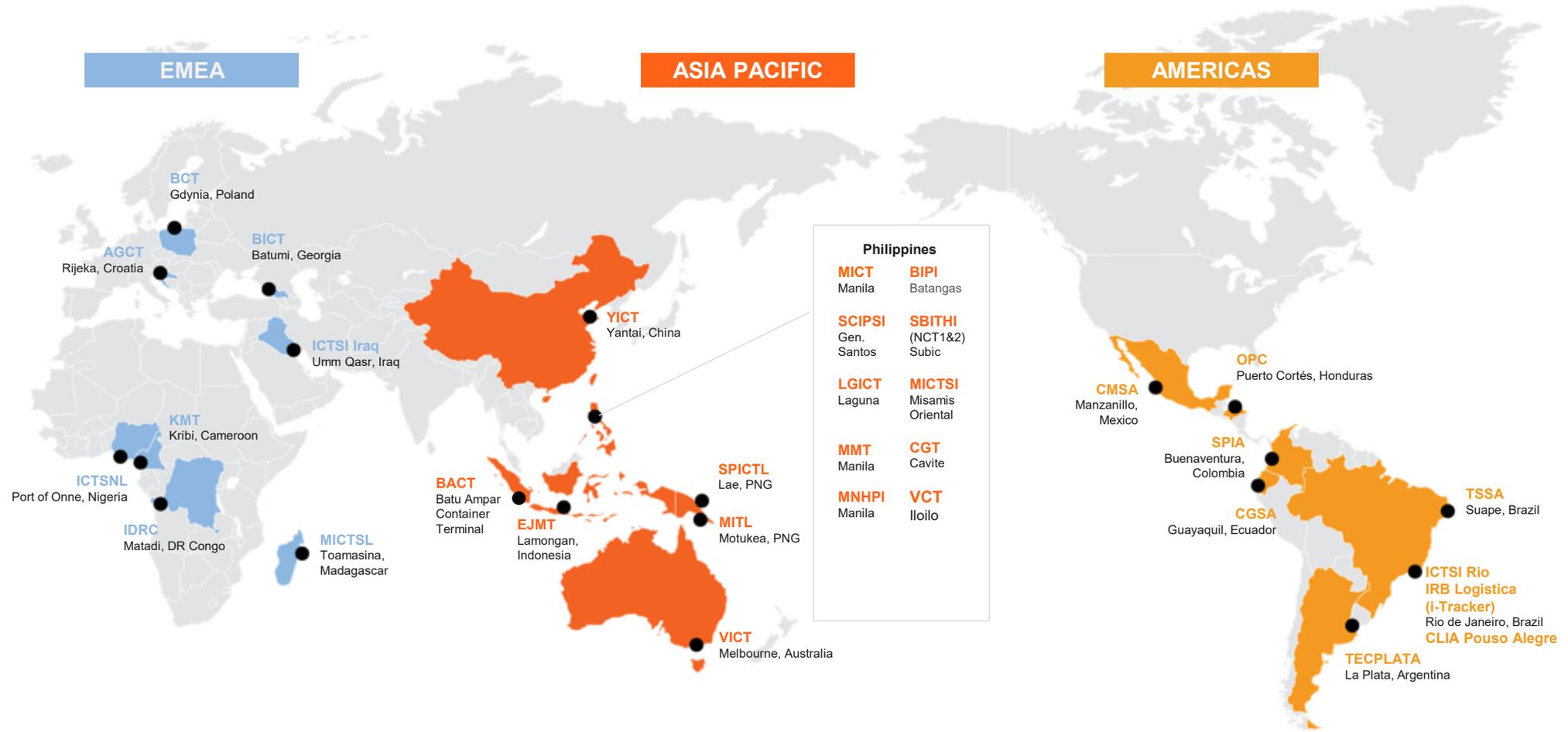


+35

YEARS

Our expertise enable us to navigate and operate in different political and economic environments.

Globally Diversified Footprint



No. of Terminals

8

16

9

ICTSI Philippine Terminals



NORTH LUZON



International Gateway for North Locators

Next major agriculture transshipment hub providing connectivity to North and Central Luzon



CENTRAL & SOUTH LUZON

Manila International Container Terminal



Philippines largest gateway terminal

Most modern and accessible terminal connecting the country to the rest of the world

VISAYAS



International Gateway for Central Philippines

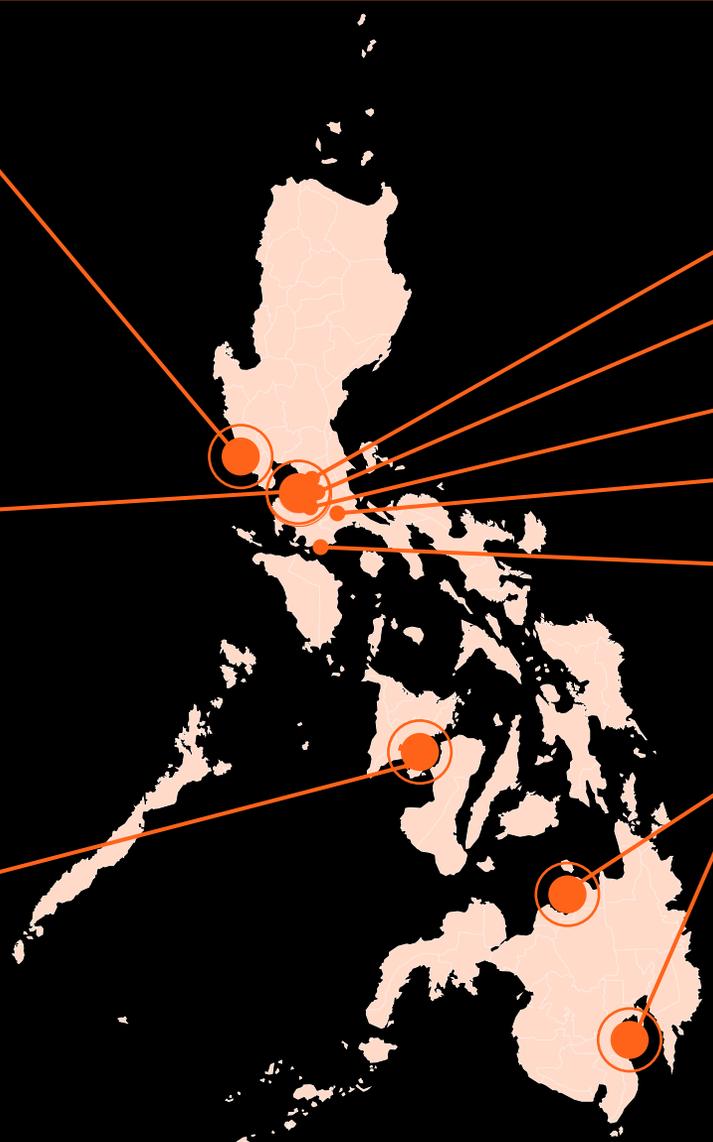
Strategically located at the heart of Central Philippines' high-growth regions

MINDANAO



International Gateway for South of the Philippines

Serving international and local cargo movement for nearby region's industrial estates



Manila International Container Terminal

The Philippines' largest and most advanced international container terminal with operational efficiencies at par with the best terminals in the world

TERMINAL OVERVIEW

107.1
hectares

Terminal
Area

3.3 M
TEUs

Annual
Capacity

71%

Manila
Market
share



MICT Expansion Plan 2027



BERTH 8

200,000

TEUs

YARD
CAPACITY

3.5M

TEUs

TERMINAL
CAPACITY

18,000-TEU

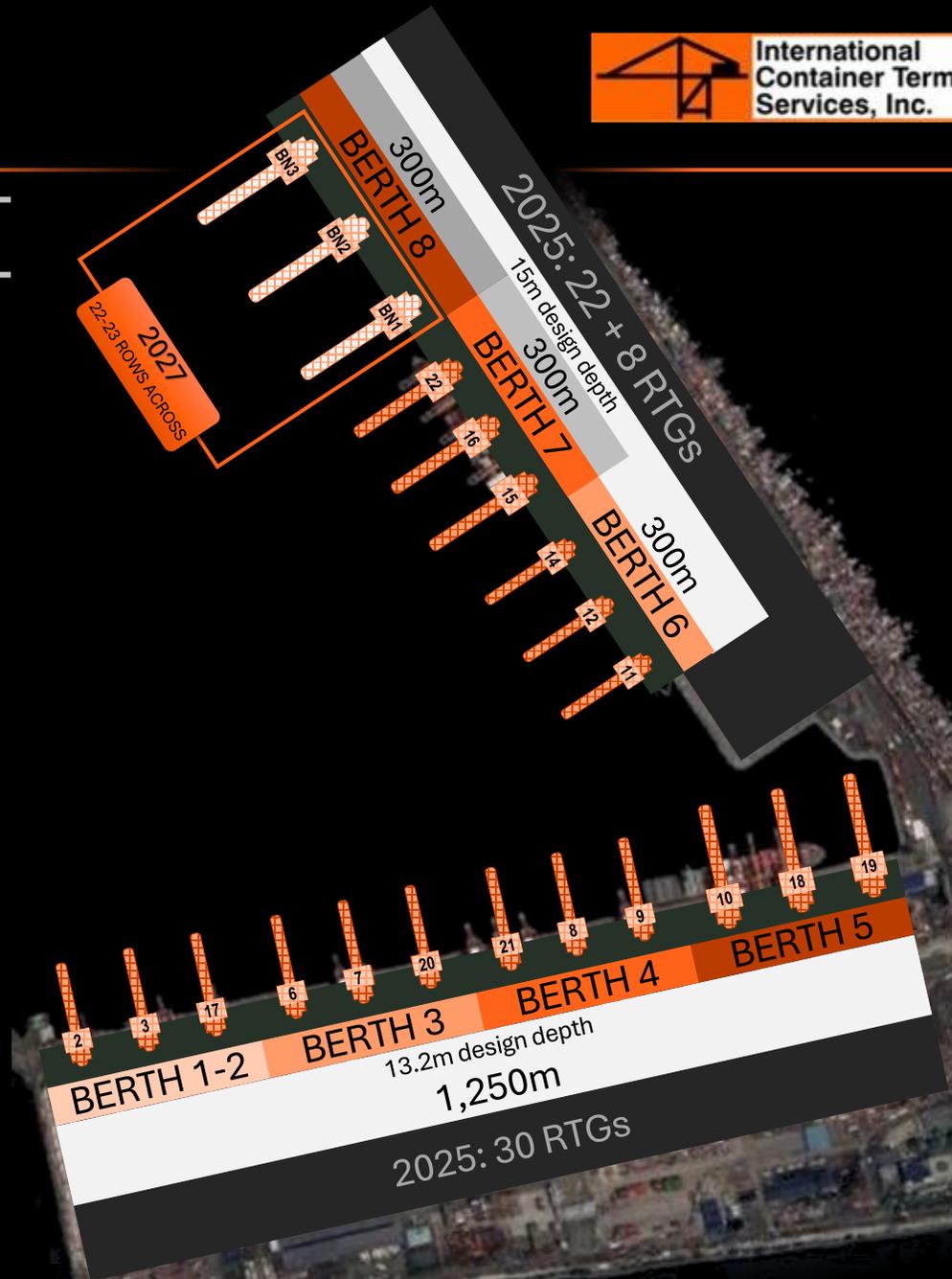
vessels

VESSEL
CAPACITY

15B

PHP

CAPEX
BUDGET



NorthPort: Philippines Domestic Gateway

Manila North Harbor Port, Inc.



2.3M TEUs ANNUAL CAPACITY	61 hectares TERMINAL AREA	5,758 meters QUAY LENGTH	5.3 days IMPORT CDT	45% YARD UTILIZATION
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LGICT – Inland Container Terminal



Actual as of November 2025

- 20 hectares Terminal Area
- 10K TEUs Yard Capacity
- 250K TEUs Terminal Capacity
- 1200 sqm CY- CFS
- 60 power outlet Reefer Plugs
- 12 Heating ports ISO Tank Heating

Services

<p>Storage</p> <p>Yard Storage Facility Container and Project Cargo Open Yard Stripping and Stuffing</p> <p>Reefer Storage Electrical Plug-ins</p> <p>Container Freight Station Cross-Docking Operations</p>	<p>Transfers</p> <p>Off-Dock Customs Facility (OCF) Transfer [MICT ~ LGICT]</p> <p>Export Drop-off Services [LGICT ~ MICT]</p> <p>Import Customs Cleared Transfer [MICT ~ LGICT]</p>
<p>Other Services</p> <p>Container and ISO Tank M&R ISO Tank Pre-Heating OOG/Project Cargo Handling Equipment related Services Area Subleasing</p>	<p>Transport</p> <p>Trucking Services Container Last-Mile Delivery</p> <p>Freight /Cargo Train Services Pending development</p>

- ✓ Express Lane Transfer Processing
- ✓ Terminal TABS/Release priority
- ✓ Dedicated BOC Support
- ✓ Mon – Sat Warehouse Operations
- ✓ Off-Dock Container Yard Complement

CGT –Barge Multi-purpose Terminal

115,000
TEU Capacity

6 ha

Terminal Area

4 ha

Container Yard

8

Handling Equipment

60

Reefer Plugs

2

Gate Lanes

60m x 200m

Barge Wharf Hardstand

18.5m

Barge Ramp wide

4.5

Dredging Level

50KN/m²

Barge Wharf Capacity

300KN

Fenders and Bollard

2

Beacon Lights



Actual as of August 2025

- ✓ **Customs Facility**
- ✓ **Barge/LCT/RORO Terminal**
- ✓ **Off-Dock Container Yard**

Developing Philippine Terminals

Subic Bay International Container Terminal



South Luzon Container Terminal



Visayas Container Terminal



Mindanao Container Terminal



South Luzon Container Terminal (SLCT)

OPERATIONAL BY 2028



>2M
TEUs

ANNUAL
CAPACITY

50
hectares

TERMINAL
AREA

18
meters

DRAFT

8

QUAY
CRANES

800
meters

QUAY
LENGTH

800M
USD

INVESTMENT

Strategic Clusters within the Region's Free Zone

Logistics Village

Warehousing and distribution hubs

Truck yards and container storage

Ideal for 3PLs and consolidation centers

Light Manufacturing Zone

Assembly, repackaging, labeling

Bonded production facilities for re-export

PEZA-compliant infrastructure

Commercial Services Cluster

Admin offices, support buildings

Customs brokers, banks, food and retail

Designed for tenant convenience and operations

Port + Free Zone: A Seamless End-to-End Platform



SLCT

- Deep-water port with ultra post-Panamax capability
- Direct berth-to-yard handling
- Efficient customs clearance and appointment systems
- Serving global shipping lines

Region 4-A FREE ZONE

- Immediate access to bonded warehouses
- Consolidation and value-added services
- Support facilities (3PLs, admin offices, utilities)
- Ideal for Just-in-Time and regional hub models

A unique **ICTSI-led ecosystem** offering seamless importation, processing, and distribution in one location.

Accessibility to PEZA Zones



Major PEZA Zones	MICT	LGICT	SLCT
Toyota Special Economic Zone	46km	14km	76km
Laguna Int'l. Industrial Park	48km	16km	79km
Laguna Techno Park Inc.	51km	17km	78km
Light Industry & Science Park 1	51km	9km	70km
Light Industry & Science Park 2	57km	6km	63km
Light Industry & Science Park 3	65km	14km	56km
Carmelray Industrial Park 1	58km	15km	78km
Carmelray Industrial Park 2	59km	8km	60km
First Philippine Industrial Park	62km	12km	56km
YTMI Realty Corporation	75km	19km	58km
People's Technology Park	43km	20km	80km
Silangan Industrial Park	53km	5km	67km
LIMA Technology Center	79km	28km	49km
Calamba Premier Ind'l. Park	58km	4km	66km



Unified Customer Service Operations



NORTH LUZON



customercare@sbitc.ictsi.com



CENTRAL & SOUTH LUZON

Manila International Container Terminal



customercare@ictsi.com



customercare@northport.ph



VISAYAS



customercare@vct.ictsi.com



MINDANAO



customercare@mct.ictsi.com



Unified Customer Support Tools & Digital Services



TALK TO ISSA
ICTSI SUPPORT SERVICES ASSISTANT

A port user's easy and fast contact to a customer support representative

- 24/7 Live Agent
- AI Interaction
- Omni-channel Support
- VIP Assistance

Customer Hub

A knowledge portal of all information a port user may need on the terminal – from procedures to transaction requirements to system processes



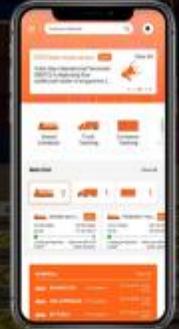
NAVIGATE

A digital platform that will provide services to optimize the movement of trucks and containers in and out of the terminal

- Faster Online Invoicing and Fee Settlement
- User Empowerment to Minimize Port Fees
- Increased Driver Productivity
- Real-Time Coordination with Shippers & LSPs

ICTSI Radar

A convenient online transparency tool that will allow port users to track containers, trucks and vessels anytime, anywhere



✓ Billing Computation Inquiry	UPCOMING
✓ Terminal Gate-In CCTV	• Data Subscription
✓ Online EIR	• Knowledge Portal
✓ Port Visit Request	• Single Sign-On Access



**KALAKBAY
REWARDS**

A customer loyalty program for truck drivers and payors that allows them to earn points per terminal transaction and exchange for various rewards



**ICTSI
MASTERCLASS**

A customer education and awareness initiative that provides deep-dive sessions on terminal systems and processes

Futureproofing the Supply Chain

- **ICTSI has a strong footprint: managing multiple terminals in the Philippines**
- **ICTSI is investing significantly in port/infrastructure upgrades**
- **ICTSI embraces technology and digitalization, focus on cyber security**
- **The Philippines has favourable geography for ICTSI to develop further the network**
- **Build redundancy – multiple entry/exit points, backup terminals, quicker turnarounds**
- **Focus on talent, training digital logistics, IoT/automation, safety, process improvement**
- **Encourage innovation, partnerships with tech firms/startups to imagine next-gen port/logistics services**
- **Develop a culture of continuous improvement – benchmark global best practice, cut truck waiting times, yard dwell times, improve vessel turnaround.**



Thank you