

# 2026 Philippine Ports & Logistics

Manila, Philippines, 11 March 2026



Intermodal Logistics  
as Value Factor: The  
Integration of Road,  
Rail and Sea Supply  
Chain and Logistics  
and Management



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# Content

01

Maersk in the  
Philippines

02

Global Trade  
Updates

03

Zooming in on  
Asia Pacific

04

Complexity in  
Asia Pacific

05

Resilience in  
complexity



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# Hej!



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# Maersk Portfolio in the Philippines



## International Ocean and L&S

- 370,000+ FFEs Ocean Volume
- 5,500Tons Airfreight
- 24K FFE Truck Moves
- 8 Feeder services calling weekly
- 19K CHB Declarations

## Domestic Ocean (MCCP)

- 10 Port calls weekly
- 57,000 FFEs
- 3 Vessels
- Revenue: 50M USD
- FFW: 87% BCO: 13%

## Contract Logistics

- 73+ Distribution Centers
- 549M VAS Packs
- 120K Trips
- 570K Managed Orders
- 11K FFE inter-island
- Control Tower

# Updates on Global Trade

(Feb 2026)



# Summary | The global economy sustained positive momentum, but uncertainty remains. Global container trade saw solid growth in 2025 despite trade tensions.

## Category

## Key Insights

### Global Economy

- The global economy delivered another year of above-potential GDP growth in 2025, supported by a resilient US economy driven by AI investment and strong consumer demand. China met its 'around 5%' target powered by manufacturing exports, while the Euro Area gradually improved. Entering 2026, the outlook is shaped by both strong momentum and elevated geopolitical tensions.
- In the US, goods demand rose 2.4% on a 3m y/y basis and by 2.1% on a 3m/3m basis (annualised) in November.
- In the Euro Area, retail sales (excl. food & fuel) increased by 1.2% 3m/3m (annualised) in December and by 2.6% on a 3m y/y basis, suggesting more cautious consumer spending. Meanwhile, industrial production was up 1.9% on a 3m y/y basis, but hovers only around pre-pandemic levels.
- In China, industrial output picked up, increasing by 5.2% y/y in December. Retail sales growth declined from 1.3% y/y in November to just 0.9% in December, while fixed investment remained weak, contracting 16% y/y.

### Ocean Demand & Supply

- Global container trade remained robust, up 4.4% y/y over the October-December period. Import volumes surged in LAM, EUR, WCA, and AFR, while exports from LAM, NAM, WCA, FEA, and OCE were strong. In the same period, NAM import volumes declined by -4.9% compared to last year and remain well below the 2011-19 average growth rate.
- Nominal fleet growth slowed to a still elevated 7.2% y/y in December (a 24-month low) as deliveries continue to taper off and scrapping activity remains non-existent.

### Bunker & Rates

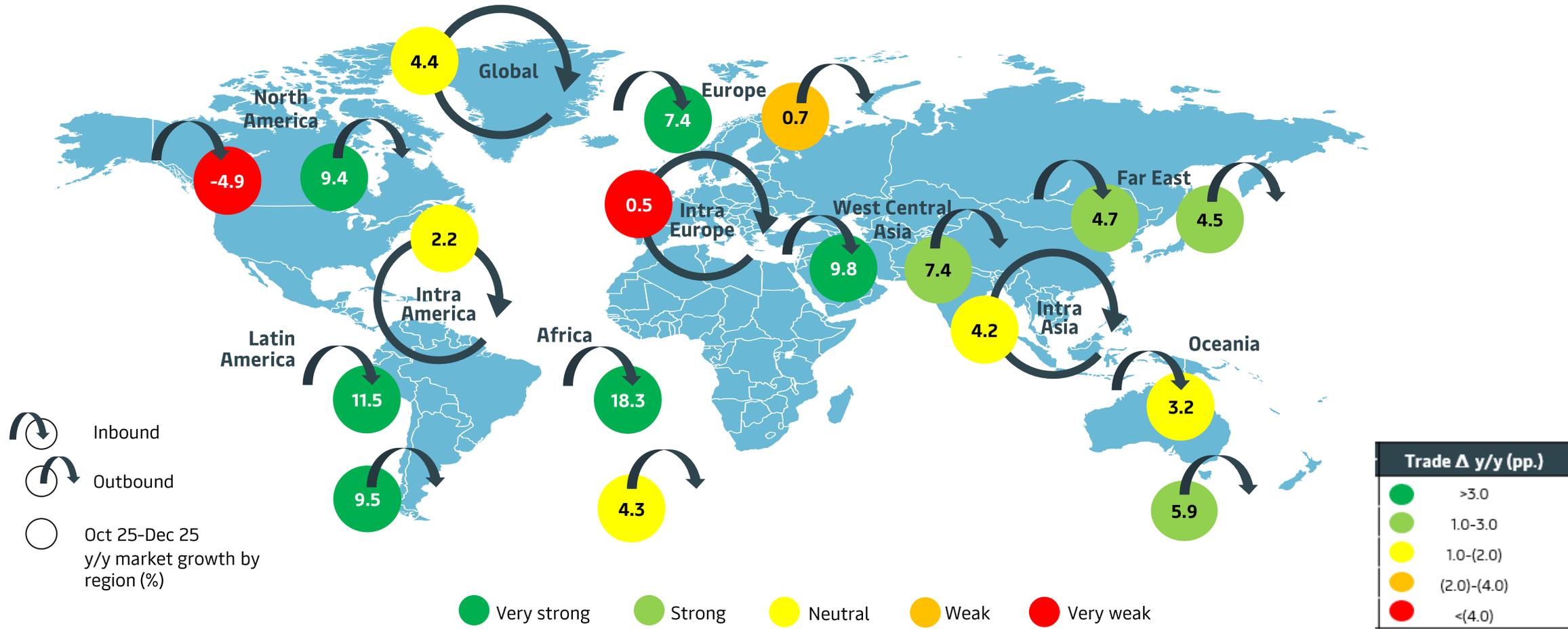
- Spot rates remain under pressure, staying sharply lower than in H2 2024.
- Charter rates increased slightly, staying at the highest level since late 2022.
- Bunker prices decreased by -10.7% 3m/3m in December and by -21.1% on a 3m y/y basis.

Note: 3m refer to the most recent 3-month period.

Source: Accenture Cargo, IATA, J.P. Morgan, LSEG, Rotare, Maersk Strategic Insights



Container Demand | Global container trade remains robust, driven by imports in LAM, EUR, WCA, and AFR, while NAM softens. Exports surge in LAM and NAM.



Note: 1) Data displayed on geographical regions excl. Intra REG 2) IET exuding Intra WCA. IAS excluding FEA to/from WCA and IAM including Intra Brazil  
 3) Colour embed information on the current dynamics relative to the 2011-19 average.



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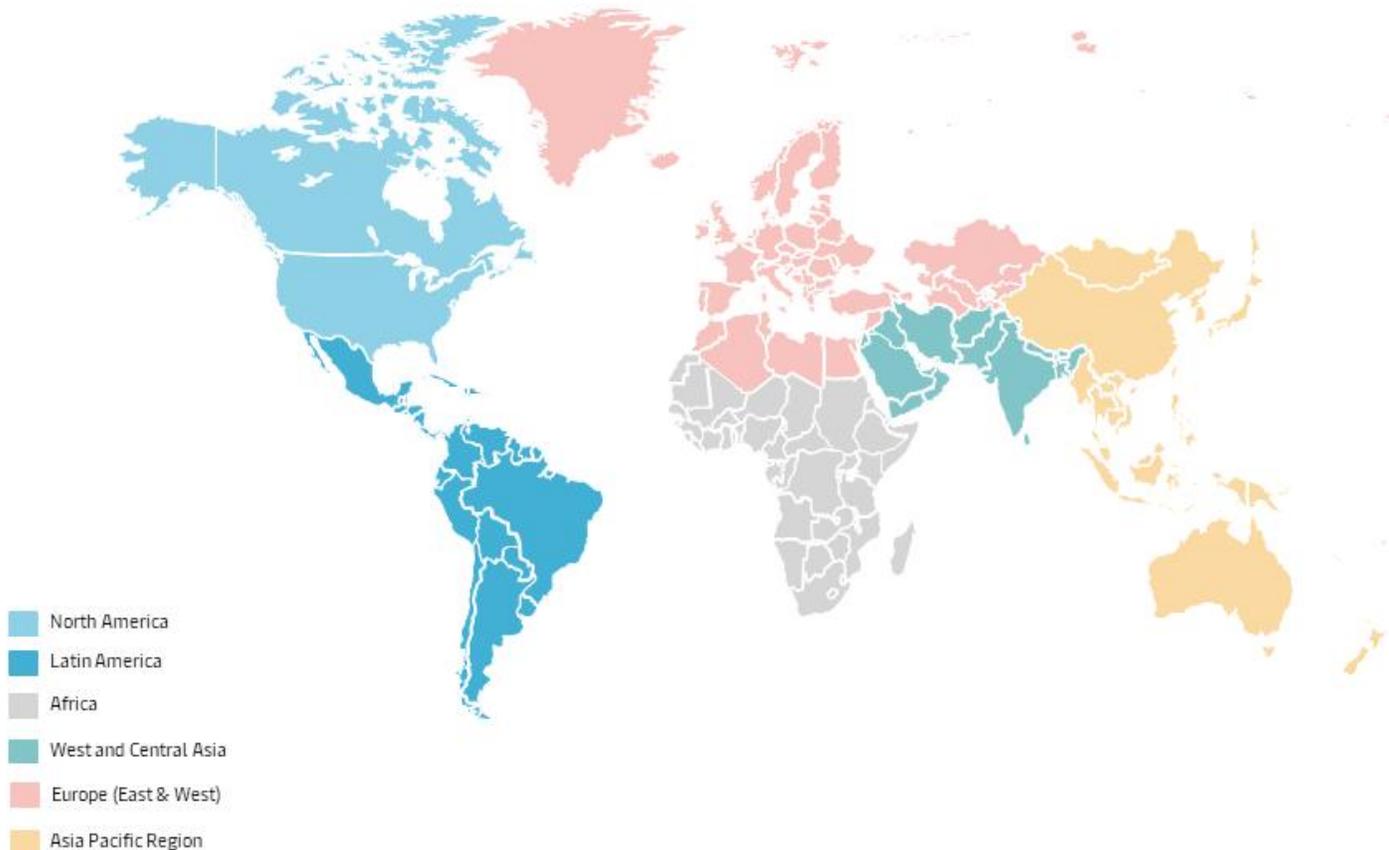
Source: Maersk Strategic Insights Ocean Container Market estimations as of Feb 2026

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Asia Pacific is a dynamic, diverse, and fast-growing region. It is the backbone of global production, and at the same time center of gravity for consumer demand.

# Asia Pacific is a global growth engine



Population is 4.8 billion, ~60% of the world's population



GDP share of the world – 46.85%



38.9% - APA share of global nominal exports, and 36.7% - global nominal imports\*



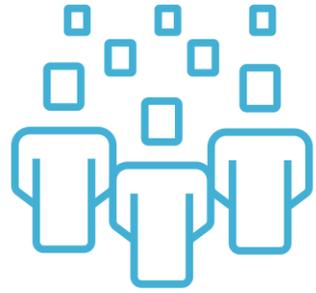
APA exports grew 3.4% (global average 1.8%) and imports grew 3.6% (global 2.2%)



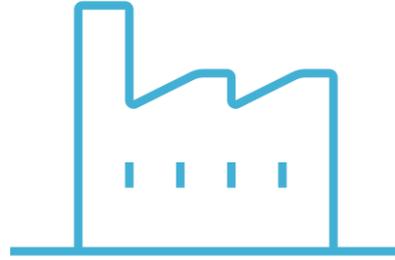
Intra Asia trade accounts for ~60% of APA exports, outpacing global trade growths

\*UN ESCAP 2024/2025

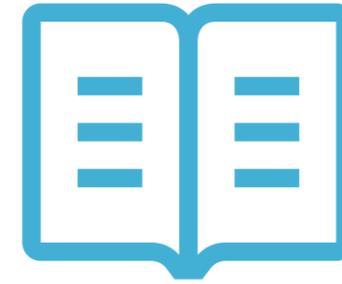
# Complexities in Asia Pacific Supply Chain



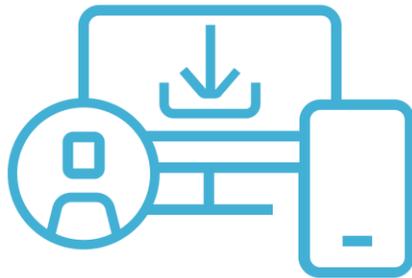
Geopolitical Tensions and Volatility



China+1 Diversification



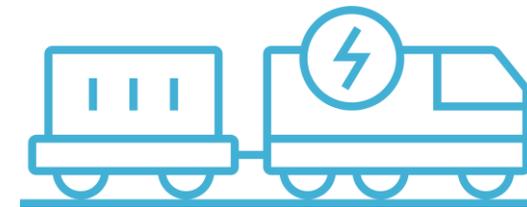
Regulatory Fragmentation



Technology Transformation



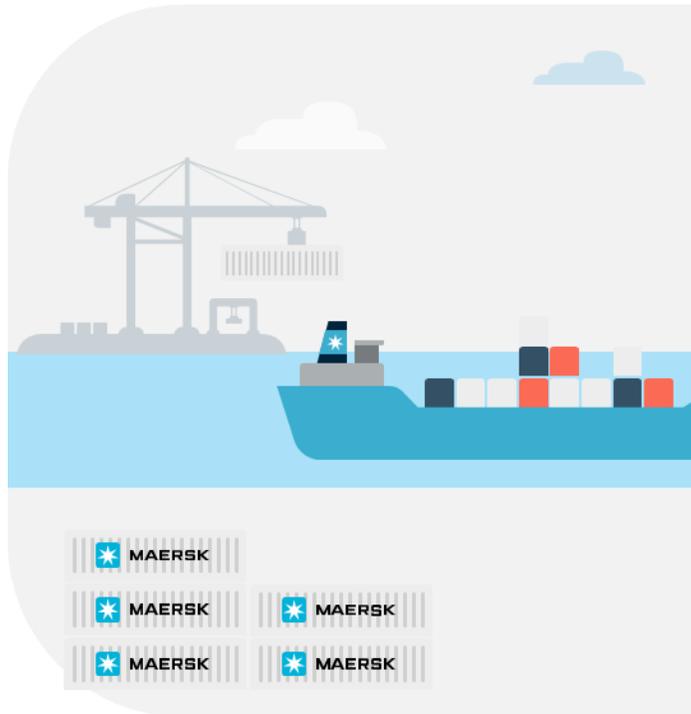
ESG Requirements



Infrastructure Limitations and Geographic Diversity

# Infrastructure Limitations & Geographic Diversity

Global shipping and supply chains are currently facing several **significant disruptions**. These disruptions highlight the need for companies to develop more **resilient and adaptable supply chains** to navigate the complexities of the current global environment.



## 1 Geographic Diversity

- Different geographies, archipelagic countries

## 2 Environmental vulnerability

- Typhoons, flooding, earthquakes, seasonal monsoons

## 3 Variances in Port Capacity

- Draft restricted ports, no own equipment
- Mega ports & terminals

## 4 Infrastructure gaps

- Road connectivity
- Rail infrastructure

## 5 Technology Infrastructure

- Digitization varies widely across the region

## 6 Regulatory Differences

- Varying Customs procedures, trade rules and documentation standards

- Port Congestion
- Capacity Crunch
- Vessel Delays
- Cost Increase

Logistics in Asia Pacific poses both **internal and external complexities**, different from that of other regions. This is a **challenge**, and an **opportunity** for supply chains.

How do we overcome?



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# Resilience in the Face of Complexity



Build network agility



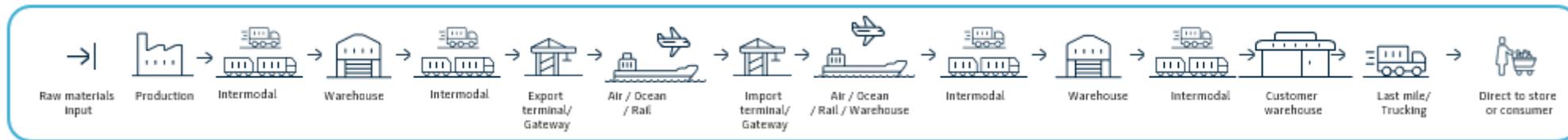
Strengthen visibility through digital platforms



Supplier & vendor collaboration



Embrace integrated logistics models





Thank you!

