TransPORTing Light to the Nation

Jakarta, 10 Desember 2015
Indonesia’s Maritime Logistic Panel Discussion
R.J.Lino
Direktur Utama
PT. Pelabuhan Indonesia II (Persero)
INDONESIA LOGISTIC COST

Nearly 5% of GDP can be saved by decreasing the country’s total cost of logistics.

Potential reduction of Indonesian logistic costs

<table>
<thead>
<tr>
<th>Percent of GDP</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.1%</td>
<td>Inventory: Impact from speeding up supply chain and increasing reliability</td>
</tr>
<tr>
<td>1.5%</td>
<td>Maritime-related Land: Trucking cost reduction, Land-to-sea substitution</td>
</tr>
<tr>
<td>0.4%</td>
<td>Water: Lower direct costs, increased containerization and Land-to-sea substitution</td>
</tr>
<tr>
<td>0.9%</td>
<td>Admin: Decrease due to savings in transportation and inventory</td>
</tr>
<tr>
<td>~5.0%</td>
<td>Total impact on GDP Percent</td>
</tr>
</tbody>
</table>

1 Savings assigned to each category based on weighted average of savings contribution to GDP of signature products on an overall GDP impact of 2.26%; Note that Warehousing and administration savings partly allocated to Land and water proportionally; 2 Air, Rail, and Services;

Re-investing the proceeds into infrastructure could result in additional yearly effect of >2% GDP growth during construction (>1% in the long-term)

**Short term (demand-side GDP stimulus)**

\[ \Delta GDP = \text{Investment} \times \text{GDP multiplier} = 1.21 \]

- **Direct effect**: Increased spending on wages, supplies, and support infrastructure
- **Indirect effect**: Extra added value from sub-suppliers
- **Induced effect**: Revenue from consumption by employees and economic activity in adjacent sectors

**5% of GDP Re-invested**

**Long term (supply-side GDP growth)**

\[ \Delta GDP = \frac{\text{Elasticity}}{\text{Stock as % of GDP}} \left( \text{New infra investment} - \text{Absolute depreciation of existing assets} \right) \]

- **Elasticity** to infrastructure between 0.086 and 0.144
- **Infrastructure stock** in Indonesia is 28% of GDP
- **Depreciation** of 2.5% (assuming 40-year asset life)

**+1-2% yearly GDP effect over duration of construction**

**+1-2% GDP growth**

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1. Indonesia-specific multiplier obtained from World Input-Output Database, derived from an input-output model, which is an advanced quantitative economic technique that represents the linkages between branches of the national economy (output of one industry is an input to each other industry in a linear model).
3. Based on historical expenditure and using the perpetual inventory method for 2012: transport infrastructure stock is understated, as expenditure for rail, ports, and airports is not available.
4. This would be spread over the duration of construction — e.g. assuming 5-year average, the yearly effect would be 1.2-2%.

SOURCE: World Input-Output Database, McKinsey Global Institute analysis, team analysis
CHALLENGES
Producer care more about Reliability than Cost of Logistic

Survey results for LSPs
- Reliability: 30%
- Time: 31%
- Cost: 39%

Survey results for Manufacturers
- Reliability: 41%
- Time: 31%
- Cost: 28%

Transport cost only 45.3% of Logistic Cost


5 Other countries that use logistics costs/sales include Japan, Finland, France and Germany.
Sea freight cost MAX 6% of the Value of Goods

### The Challenge Today

**Other coastal transport examples**

<table>
<thead>
<tr>
<th>City pairs</th>
<th>Distance kilometers</th>
<th>Maritime traffic as percentage of total, percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jakarta – Surabaya¹</td>
<td>~800</td>
<td>9 Sea; 90 Road; 1 Rail</td>
</tr>
<tr>
<td>Norway (Rorvik – Bodo)</td>
<td>~550</td>
<td>48 Sea; 42 Road; 10 Rail</td>
</tr>
<tr>
<td>Japan (Tokyo – Miyagi)</td>
<td>~720</td>
<td>51 Sea; 44 Road; 5 Rail</td>
</tr>
</tbody>
</table>

¹ Rail traffic derived from Railway MasterPlan, Maritime traffic derived from total container traffic assuming FCL (24T)

**SOURCE:** Indii, Konkurransefatt i godstransport of intermodale transporter, Multimodal transport strategy: Java Corridor, MLIT
EASTERN INDONESIA REGION TRANSPORT PROJECT
(IBRD LOAN 4744 IND)

KALIMANTAN ROAD NETWORK
DEVELOPMENT STUDY

MIDTERM REPORT No 2

September 2007
If these issues were addressed today, the domestic network in the country would be significantly consolidated and result in lower sea voyage costs by 48%.

2012 current network is point to point with 4 major hubs

Optimized network based on port performance aspirations and cost-minimization has transshipments and features sub-hubs

<table>
<thead>
<tr>
<th>Current network</th>
<th>Improved handling &amp; Cost optimization</th>
</tr>
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<tbody>
<tr>
<td>Transshipments</td>
<td>0%</td>
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<tr>
<td>Vessel utilization</td>
<td>41%</td>
</tr>
<tr>
<td>Number of vessels</td>
<td>274</td>
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<tr>
<td>Avg vessel size, TEU</td>
<td>~700</td>
</tr>
<tr>
<td>Cost per TEU, USD</td>
<td>366</td>
</tr>
</tbody>
</table>

48%

SOURCE: MOT, Tg Priok O&D, World Fleet Register Report, Network model output, Team analysis
• Market size of the transhipment hinterland are determined by container gateway volume handled at the feeder ports in the Eastern Region
• The feeder ports have infrastructure limitations, which provides the opportunity for shipping lines to use larger ships to tranship via Sorong, therefore saving liner network costs
• The market share that can be captured by Sorong will depend on a combination of factors including: Pricing, productivity and infrastructure. These will determine lines’ approach to network strategy in the Eastern Region and the share moving by transhipment.

Source: Pendulum Study, Drewry Maritime Advisors
The domestic port sector aspiration should be to reach best practices on key performance metrics in successive waves.

<table>
<thead>
<tr>
<th>Improvements required</th>
<th>Backbone ports</th>
<th>ASEAN 2015 ports</th>
<th>All other ports</th>
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<tr>
<td>Waiting time at anchorage Hours</td>
<td>2</td>
<td>2</td>
<td>2</td>
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<tr>
<td>Gross crane productivity MPH</td>
<td>10</td>
<td>11</td>
<td>7</td>
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<tr>
<td>Crane intensity # cranes</td>
<td>1-2</td>
<td>1-2</td>
<td>1-0</td>
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<tr>
<td>Domestic Dwelling Time Days</td>
<td>5</td>
<td>5</td>
<td>5</td>
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</tbody>
</table>

- Launch “Survival toolkit program” to enforce basic processes at all ports e.g. fixed berthing window, with productivity targeted to be increased by 30% in short time frame.
- Continue improvement by launching more complete transformation, including implementation of Performance Management System (TOS), first in Tg Priok then in other ports.

1 Sorong, Bitung, Banjarmasin, Pontianak, Palembang, Jayapura, Balikpapan, Semarang, Panjang
SOURCE: Pelindo I, II, III, IV; Team analysis
Productivity History

JICT

Gross Crane Rate (Move per hour)

Source: JICT
Domestic Shipping
65% di Pelabuhan
35% Berlayar
Seeing is believing

Why images hold the key to high impact communications
Melihat Wajah Baru Pelabuhan Tanjung Priok

SEA TOLL PROGRAM
Sea Toll Program

Main Sea-Corridor

Sumber: IPC (2012)
WHAT IS “SEA TOLL”??

WE BUILT SEA TRANSPORTATION SYSTEM

NOT ONLY “BANGUN PELABUHAN”
Program Tol Laut is **The Holistic Maritime Logistics Reform and Development** ...

Sea Toll Program is not just about building new ports and adding new ships.
Human Resource Development

IPC Corporate University
What IPC do now and here...

... is providing you a center of excellence for Port, Maritime and Logistics education...

... as a key soft infrastructure in succeeding Program Tol Laut

Source: IPC, PMLI
IPC has invested a lot to strengthen our Human Capital which will help support the IPC Corporate University ...

176 people
Master Program overseas;

77 people Exec. MBA Program Overseas;

15 advisors from world-class company

~35 professional hired from best-in-sector company

Source: IPC
Closing Remarks Townhall Meeting | IPC | May 15
... and IPC is still continuing to strengthen our Human Capital through IPC Ph.D program

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<th>Topics</th>
<th>University</th>
<th>Join year</th>
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<tr>
<td>Port Economics</td>
<td><a href="#">Cardiff University</a></td>
<td>2014</td>
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<tr>
<td>Port Planning</td>
<td><a href="#">UNESCO-IHE</a> Institute for Water Education</td>
<td>2015</td>
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<tr>
<td>Port and Shipping</td>
<td><a href="#">Cardiff University</a></td>
<td>2016</td>
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<tr>
<td>Maritime Logistics</td>
<td><a href="#">Erasmus Universiteit Rotterdam</a></td>
<td>2016</td>
</tr>
<tr>
<td>Port Logistics</td>
<td><a href="#">UNESCO-IHE</a> Institute for Water Education</td>
<td>2016</td>
</tr>
</tbody>
</table>

*Source: IPC*
IPC Corporate University has been equipped with world-class facilities (1/2)
IPC Corporate University has been equipped with world-class facilities (2/2)

**Crane and Ship Simulator**

Simulator to train crane operator and ship pilot; aims to standardize the skills and fill the needs of new crane operator

**Port and Logistics Center**

Integrated building to train and simulate warehouse ops. and management system, including 3PL system

**Container Terminal Planning and Control Center**

Labs to train planner and simulate Planning & Control activities as the command center of terminal operations

**ERP Learning Center**

ERP labs to train IT-based business management system

Source: PMLI

Closing Remarks Townhall Meeting | IPC | May 15
Re-Modeling of Tanjung Priok Port
BEFORE
AFTER
AFTER
BEFORE

“ACCEPTED” NORMAL STANDART

DISORGANIZED OFFICE
BEFORE

“ACCEPTED” NORMAL STANDART

PILE OF FILES EVERYWHERE
BEFORE

"ACCEPTED" NORMAL STANDART

DISORGANIZED OFFICE
AFTER

NEW NORMAL

WORLD CLASS OFFICE
AFTER

NEW NORMAL

WORLD CLASS OFFICE
AFTER

NEW NORMAL

WORLD CLASS OFFICE
AFTER

NEW NORMAL

WORLD CLASS OFFICE
BEFORE

"ACCEPTED" NORMAL STANDART

DISORGANIZED PORT

22/02/2008
BEFORE

"ACCEPTED" NORMAL STANDART

DISORGANIZED PORT
BEFORE

“ACCEPTED” NORMAL STANDART

HOLEs EVERYWHERE 22/02/2008
BEFORE

"ACCEPTED" NORMAL STANDART

HEAVY TRAFFIC
BEFORE

“ACCEPTED” NORMAL STANDART

PEOPLE ARE SELLING GOODS INSIDE THE PORT
BEFORE

THE BIGGEST PORT IN INDONESIA

“IT’S LIKE A PORT LOCATED AT THE EDGE OF THE WORLD”
A DIFFERENT TANJUNG PRIOK: MODERNIZED EQUIPMENT
AFTER

CLEAN AND WELL-ORGANIZED TANJUNG PRIOK
AFTER

MODERN TANJUNG PRIOK

Luas Pelabuhan Tanjung Priok sekitar 600an hektare ini kini sudah jadi zero traffic!
CLEAN AND GREEN TANJUNG PRIOK

Gedung IPC nan megah sudah kelihatan!
AFTER

MODERN EQUIPMENT

Di bawah Gantry Luffing Crane, alat penunjang stevedoring
AFTER

MODERN EQUIPMENT

Crane-crane keren di sepanjang derrmaga
AFTER

MODERN PORT

Pelabuhan keren
AFTER

MODERN PORT

Crane bisa memindahkan 27 container per jam
CONTAINER VOLUME TWO TIMES COMPARED TO 5 YEARS AGO BUT LESS CONGESTION
MODERN TANJUNG PRIOK
WORLD CLASS TERMINAL
MODERN TANJUNG PRIOK
WORLD CLASS TERMINAL
WORLD CLASS TERMINAL
BEFORE

“ONE WAY TRAFFIC”

WIDTH: 150 M’
DEPTH: -14.00 M
BEFORE

NARROW CHANNEL,
SHIPS ARE PARKED WITHIN BREAK WATER
“TWO WAY TRAFFIC”,
NO SHIPS WITHIN THE BREAKWATER

WIDTH : 300 M’
DEPTH : - 16.00 M
BEFORE 2009

MAX
3,000
TEUS
AFTER 2013

MAX 5,500 TEUS
Re-Modelling Port of Panjang
BEFORE
BEFORE
AFTER
AFTER
Re-Modelling Port of Palembang
AFTER
Re-Modelling Port of Jambi
Port of Jambi

2 units Fixed Luffing Crane
3 units RMGC
Re-Modelling Port of Pontianak
BEFORE
AFTER
BEFORE

AFTER

Kemacetan lalu lintas
BEFORE
AFTER
AFTER
Re-Modelling Port of Teluk Bayur
BEFORE
BEFORE
AFTER
AFTER
AFTER
Re-Modelling Port of Bengkulu
BEFORE
AFTER
BEFORE
AFTER
BEFORE
Re-Modelling Port of Ciwandan-Banten
Port of Ciwandan

4 units Gantry Luffing Crane
New Port Development
NEW PRIOK TERMINAL DEVELOPMENT
NEW PRIOK TERMINAL DEVELOPMENT

THE SAME SIZE AS THE OLD TANJUNG PRIOK (130 YEARS), WITH TWICE THE CAPACITY

CT : Container Terminal
PT : Product Terminal
Access Road Development Plan

TOTAL COST ± Rp 70 Trilliun WITHOUT "APBN"
Equipment Installation Progress

SHIPS 20,000 TEUS
STATE OF THE ART
CONTAINER TERMINAL
Access Road
Access Road

Access Road (Sea Side) - 700 m of length
Access Road (Southern Side)

Southern access road (land side) – 1.2 km of length
ROAD ACCESS
INLAND WATERWAYS
TG-PRIOK – BEKASI- CIKARANG
INDLAND WATERWAY FROM TG.PRIOK - BATAVIA
Container Barge
Twente Canal (5,000 DWT barge)

A modern canal for bulk cargoes

- 65 km long
- Links Twente to branches of the Rhine
The Manchester Ship Canal (160 TEU barge)

An old canal with modern container barges

- 65 km long
Existing Layout of CBL Canal

PEMBANGUNAN INLAND WATERWAYS DI KAWASAN BEKASI

Development Phase: 2015-2019
Removing 3 million TEU from our roads

- 6 m TEU of containers
- 3 m TEU of containers
- All containers on the roads
Potential coal and iron ore operation

From South Sumatra direct to the furnace

From Kalimantan direct to the power station
**Purpose New Canal Cibitung-Cikampek**

- **Port of Tanjung Priok**
- **Cibitung**
- **Jababeka Industrial Area**
- **Karawang**
- **KIIC Karawang**
- **Cikampek**
- **To Bandung**
- **To Cirebon**

Legend:
- JALUR REL
- KANAL CBL
- TOLL ROAD JKT - CIKAMPEK
- TOLL ROAD PURBALEUNGYI
- NEW KANAL CIBITUNG CIKAMPEK
- BARGE TERMINAL

Image Credit: TerraMetrics

Data: SIO, NOAA, U.S. Navy, NGA, GEBCO
Kijing – New Deep Water Port
West Kalimantan
Liquid Bulk

Dry Bulk

Container Terminal

Multi-purpose Terminal

Source: BMT
Industrial Area & Cargo Distribution Center

SPECIAL ECONOMIC ZONE 5000 ha
CPO will be a major cargo at the port given the access to plantations via the Kampausas river.
PRELIMINARY STUDY OF SPECIAL ECONOMIC ZONE AT KIJING – WEST KALIMANTAN INDONESIA

CONSULTANT
Global Maritime and Port Services Pte Ltd

CLIENT
Indonesia Port Corporation (Pelindo II)
**Focus on Preliminary Layout Plan**

**Issue:** How the proposed Kijing SEZ (Phase 1) potentially looks like?

**Rubber Industry:** (1) Premium shore/seaside frontage to meet logistics needs; (2) northern border to facilitate access to raw materials from inland areas; (3) Border site to minimize potential pollution impacts on neighboring zones.

**Palm Oil Industry:** Premium shore/seaside frontage to meet liquid bulk product logistics needs.

**Mixed Industry Zone (Miscellaneous light industries):**
(1) Integration with spillovers from other industry zones; (2) Access from outside of the proposed SEZ.

**Food Processing Industry:**
(1) Away from potentially pollutive Rubber zone; (2) Adjacent to any future expansion of the proposed Kijing SEZ beyond Phase 1 as the Kalbar economy matures and industry value chain deepens with expanded downstream activities adding value to upstream food commodities.

**Logistics Industry:**
(1) Proximity to the proposed Kijing deepwater port development to facilitate integration with port operations; (2) Easy access to arterial roads for efficient logistics operations; (3) Adjacent to any future SEZ expansion beyond Phase 1 to share facilities and optimize ROI.
New Tanjung Carat Port
South Sumatera
South Sumatera Area and River
Available and required transport capacity

<table>
<thead>
<tr>
<th>Available Capacity</th>
<th>Required Capacity</th>
</tr>
</thead>
<tbody>
<tr>
<td>7,500DWT Year-round</td>
<td>7,500DWT Year-round</td>
</tr>
<tr>
<td>250 / 1,000DWT Seasonal</td>
<td>250 / 1,000DWT Seasonal</td>
</tr>
<tr>
<td>1,000 / 2,000DWT Seasonal</td>
<td>1,000 / 2,000DWT Seasonal</td>
</tr>
</tbody>
</table>

Additional capacity needed
Tanjung Carat Deep Sea Port Development
Port Development Plan In Tanjung Carat – South Sumatera
Tanjung Carat Development Plan
Tanjung Carat Development Plan
**Tanjung Carat New Deep Port Development, Sumatera Selatan**

- **Project Location:** 
  *South Sumatera*
- **Term Development:** 36 Months (2015 - 2018)
- **Development Plan:** First Quarter of 2016
- **Operation Plan:** 2018

- **Benefit of program:**
  - Overcome limitation of the existing port and Musi River flow to serve vessel with the larger size and accommodate larger volume;
  - Added capacity up to 20 Milion Ton
East Indonesia Ports Development
Container volume snapshot: 2040

- >200,000 TEU
- 100,000-200,000 TEU
- 50,000-100,000 TEU
- 10,000 – 50,000 TEU
- <10,000 TEU

[Map showing container volume snapshot for various locations in Indonesia]
Ports owned by Pelindo III & IV requiring upgrades
Ports owned by Ministry of Transport

- Bau Bau
- Bungkutoko
- Bula
- Babang
- Belang
- Reo
- Kolaka
- Atapupu
- Anggrek
- Nangkiang
- Palopo
- Bau Bau
- Sopo
- North Maluku
- Seattle Maluku
- West Papua
- Maluku
- Southeast Sulawesi
- South Sulawesi
- West Sulawesi
- Central Sulawesi
- East Nusa Tenggara
- New Sorong
- Dobo
- New Guinea
- Papua
New Sorong Port - West Papua
Seget - Sorong Port Development Plan
## DEVELOPMENT STAGES OF SORONG PORT

<table>
<thead>
<tr>
<th>No</th>
<th>Activity</th>
<th>Phase I</th>
<th>Phase II</th>
<th>Phase III</th>
<th>Total</th>
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Presentation

PRELIMINARY STUDY OF SPECIAL ECONOMIC ZONE AT SORONG – WEST PAPUA INDONESIA

CONSULTANT
Global Maritime and Port Services Pte Ltd

CLIENT
Indonesia Port Corporation (Pelindo II)
Focus on Preliminary Layout Plan

Issue: How the proposed Sorong SEZ (Phase 1A) potentially looks like?

- **CPO and Downstream Industry:** Premium shore/seaside frontage to meet liquid bulk product logistics needs.

- **Fishery Industry:** (1) Premium shore/seaside frontage for fresh seafood processing and logistics needs; (2) Proximity to Utility zone to tap reefers power supply.

- **Logistics Industry:** (1) Adjacent to the proposed Seget deepwater port development to facilitate integration with port operations; (2) Easy access to arterial roads for efficient logistics operations; (3) Adjacent to future Phase 1B and Phase 2 in anticipation of facilities sharing to optimize the ROI of future expansion.

- **Timber and Construction Industry:** (1) Border siting to facilitate access to raw materials from inland areas; (2) Minimize potential pollution impacts caused to neighboring industries.

- **Mixed Industry zone (miscellaneous light industries):** (1) Border siting to facilitate integration with spillovers from other industry zones; (2) Easy access from outside of the proposed SEZ.

- **Food Processing Industry:** (1) Located away from potentially pollutive Timber and Construction zone; (2) Adjacent to future Phase 1B and Phase 2 in anticipation of expansion of the Food Processing Industry as the Papua Barat economy matures and industry value chain deepens with expanded downstream activities adding value to upstream food commodities.
NEW MUARA JATI PORT
CIREBON, WEST JAVA
EXISTING PORT OF MUARA JATI

Energizing Trade, Energizing Indonesia
Development Plan
New Muara Jati Phase I : 50 Ha
(2015-2020)
Development Plan
New Muara Jati Port Phase II : 153 Ha
(2020-2030)
IPC Performance
PT PELINDO II (PERSERO) FINANCIAL PERFORMANCE

10 YEARS FINANCIAL PERFORMANCE

Dalam Milyar Rupiah

- TOTAL PENDAPATAN
- TOTAL BEBAN
- LABA RUGI
- EBITDA
- TOTAL ASET

* PROYEKSI
CURRENT SITUATION
CASH : Rp 18.5 Triliun

RISK FREE CASH FLOW:
US$ 288 MILLION / year
atau Rp. 4 Triliun

GLOBAL BOND : US$ 4 Billion (Rp. 55 Triliun)
Thank You