SEMINAR E-COMMERCE
TANTANGAN DAN PELUANG BARU BISNIS TRANSPORTASI DAN LOGISTIK

HOTEL NOVOTEL BANDUNG
SABTU, 5 SEPTEMBER 2015
E-Trade

How Indonesia Existing Players Response to Major Shift in E-Commerce

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SEMINARY “E-COMMERCE: TANTANGAN DAN PELUANG BARU BISNIS TRANSPORTASI DAN LOGISTIK”
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**INDONESIA EXISTING POTENTIAL**

**Online retail sales** (2014, as % of total retail sales)

- China
- USA
- Japan
- Singapore
- Indonesia (Philippines)

Indonesia is in an early stage of e-commerce market.

**Nominal GDP Per Capita (USD)**

- **PH (Philippines):** 15
- **ID (Indonesia):** 27
- **TH (Thailand):** 91
- **IN (India):** 39
- **SG (Singapore):** 342
- **JP (Japan):** 1,353
- **US (USA):** 1,371
- **CN (China):** 328

Source: Planet retail, EIU, Wearesocial, A.T. Kearney analysis

**Online shoppers** (2014, % of population)

- **PH:** 21%
- **ID:** 16%
- **TH:** 18%
- **IN:** 14%
- **SG:** 46%
- **JP:** 40%
- **US:** 56%
- **CN:** 37%

% GDP per capital:

- **PH:** 0.5%
- **ID:** 0.8%
- **TH:** 1.6%
- **IN:** 2.3%
- **SG:** 0.6%
- **JP:** 3.7%
- **US:** 2.5%
- **CN:** 4.3%
## E-Commerce Players in Value Chain (1)

### Worldwide

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<th>Raw Material</th>
<th>Logistics Service Provider (Tier1)</th>
<th>Production Sites</th>
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**Tier 1**: Big Volume LSP; **Tier 2**: Medium Volume LSP; **Tier 3**: Last Mile (Courier)
E-COMMERCE PLAYERS IN VALUE CHAIN (2)

Indonesia

Raw Material
- Raw Material Provider

Logistics Service Provider (Tier1)
- R2X
- CKP
- MAX
- PT INTAN HOSANA
- GEO FREIGHT

Production Sites
- PT MASPION
- Indofood
- Unilever
- AQUA
- biofarma

Logistics Service Provider (Tier2)
- PUN NAR LOGISTICS
- PANCARAN
- LF
- LOOKMAN DJAJA
- BBR LOGISTICS

E-Commerce
- blanja
- BHinneka.com
- elevenia
- blibli
- Bukalapak
- tokopedia

Logistics Service Provider (Tier3)
- GO-JEK
- JNE
- TIKI
- EESL Express
- BGR Express
- POS Logistics

Tier 1: Big Volume LSP; Tier 2: Medium Volume LSP; Tier 3: Last Mile (Courier)
AUTONOMOUS LOGISTICS TRANSPORTATION
Retail goes online is necessity, effective commerce requires an effective logistics. Indonesia is in inflection point towards new state of commerce. Loser and winner will be defined in 3-5 years later. **Indonesia will take which side?**

**ECOSYSTEM**
- Less investment
- Indonesia E-Commerce are owned by foreign investors

**INFRASTRUCTURE**
- Unsupported internet speed quality to run and access any web service
- Small number of Indonesia ICT player

**REGULATION**
- There is no regulation to support and promote local player
NEW TRADE VS OLD TRADE

Amazon  Sukamart  Traveloka  Lazada  Uber  Happy Fresh

Versus

Gramedia  Indomaret  Bayu Buana  ITC  Express Taxi  Total Buah

Who will rule?
CONCLUSION

MARKET PLACE

Indonesia Competitiveness
Global Players From Indonesia
Efficient Supply & Demand Matching
Consumptive Behavior
Culture Competitiveness
Human Resource Competency

ECOSYSTEM

Visibility
Efficient Value Chain
Industrial Competitiveness
Investment
Competitiveness Low
Key Players can not drive market

AUTOMATION

Efficient
Scalable
Fast and Reliable
Internet Penetration
Application Penetration
Change Management
PORTFOLIO TELKOM RELATED WITH E-COMMERCE

trusted Server  Payment  Big data  ICT Logistics  E-Commerce

telkomsigma  Finnet  "Telkom Indonesia"  "Telkom Indonesia"  "Telkom Indonesia"

Telkom as the biggest telecommunication company in Indonesia joined with some projects aim to make Indonesia infrastructure better:

- Support Infrastructure in 24 main ports
- Developed truck database system (SIAB)
- Build National Logistics Trace Tracking Platform
- Developing integrated ICT Logistics for logistics companies in Indonesia
Peliha
Persatuan, Menangkan
Persaingan, Jayalah Indonesia,
Jayalah Telkom Indonesia