



**MINISTRY OF TRANSPORTATION**  
**DIRECTORATE GENERAL OF SEA TRANSPORTATION**



# The future of Indonesia's Port System



# INDONESIA

## GEOGRAPHIC



- ONE OF THE LARGEST MARITIME COUNTRY IN THE WORLD
- THE LARGEST ARCHIPELAGO COUNTRY
- MALACCA STRAIT
- BETWEEN ASIA AND AUSTRALIA CONTINENT
- 3 ARCHIPELAGIC SEA LANES

- MORE THAN 2000 PORTS & TERMINALS
- MORE THAN 17.500 ISLANDS
- MORE THAN 95.000 KMS OF COASTLINE



# **PORT REFORM IN INDONESIA (BASED ON THE SHIPPING LAW NO. 17/2008)**



**ELMINATING MONOPOLY OF PORT OPERATION**

**CREATING COMPETITION AMONG PORTS**

**OPEN FOR INVERSTMENT  
(PRIVATE SECTOR & REGIONAL GOVERNMENT)**

**CLEAR SEPARATION BETWEEN REGULATOR AND OPERATOR**

**ACCOMMODATING THE REGIONAL AUTONOMY**

# INDONESIA'S PORT SECTOR SYSTEM VISION



AN EFFICIENT, COMPETITIVE, AND RESPONSIVE  
PORT SYSTEM THAT FULLY SUPPORT  
INTERNATIONAL DOMESTIC TRADE AND PROMOTE  
ECONOMIC GROWTH AND REGIONAL DEVELOPMENT



INDONESIA'S  
PORT SECTOR  
SYSTEM VISION



**CREATING HUB INTERNATIONAL PORT**



**PROVIDING ACCESS TO ALL HINTERLAND  
MARKETS IN INDONESIA AND SUPPORT  
THE MAIN ECONOMIC DRIVERS**



**CONNECTING REGIONS AND ACHIEVING  
ECONOMIC DEVELOPMENT**



**PROMOTING EFFICIENT TRANSPORT LOGISTICS**

# Do you want to:

- Reduce dwell time in ports and making feeder ports more efficient?
- Increase automation in ports and encouraging 24/7 operations?
- Ensure safe and cost-effective port development and expansion through land reclamation and dredging?

Then you need to attend **Port Planning & Development Indonesia**, 01 - 04 December, 2014 - Shangri-La Hotel Jakarta, Jakarta, Indonesia

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**Port Planning  
& Development**  
Indonesia 2014



# GOALS TO ACHIEVE PORT SECTOR VISION

**1**

**SECURE PRIVATE INVESTMENT**

**2**

**INSTITUTE COMPETITION**

**3**

**ENHANCE THE LANDLORD  
MODEL OF PORT  
ADMINISTRATION IN  
INDONESIA**

**4**

**INTEGRATE PLANNING**

**5**

**CREATE AN ENABLING,  
FLEXIBLE, LEGAL AND  
REGULATORY FRAMEWORK**

**6**

**ENSURE SAFE AND SECURE  
PORT OPERATION**

**7**

**EXPAND PROTECTION OF**

**8**

**DEVELOP HUMAN RESOURCES**



**TOTAL PORTS & TERMINALS :  
± 2000**



**1129 NON COMMERCIAL PORTS**



**111 COMMERCIAL PORTS  
(INCLUDED 29 STRATEGIC PORTS)  
OPERATED BY PELINDO**



**MORE THAN 800 SPECIAL  
TERMINALS/DEDICATED PRIVATE  
PORTS FOR INDUSTRIES  
(MINNING, OIL, GAS, CHEMICAL,  
etc)**

# INDONESIA PORT STRUCTURE





# INDONESIA'S PORT

# HIERARCHY

BASED ON MINISTER OF TRANSPORTATION DEGREE NO. KP. 414 YEAR 2013

## 33 MAIN PORTS

Sabang, Belawan, Dumai, Batam (3 terminal), Palembang, Panjang, Banten, Tanjung Priok, Cilamaya, Cilacap, Semarang, Tanjung Perak, Tanjung Bulu Pandan, Bena, Socah, Teluk Lamong, Pontianak, Sampit, Banjarmasin, Tanah Ampo, Kupang, Balikpapan, Bitung, Makassar, Ternate, Pantoloan, Ambon, Sorong, Jayapura, Merauke

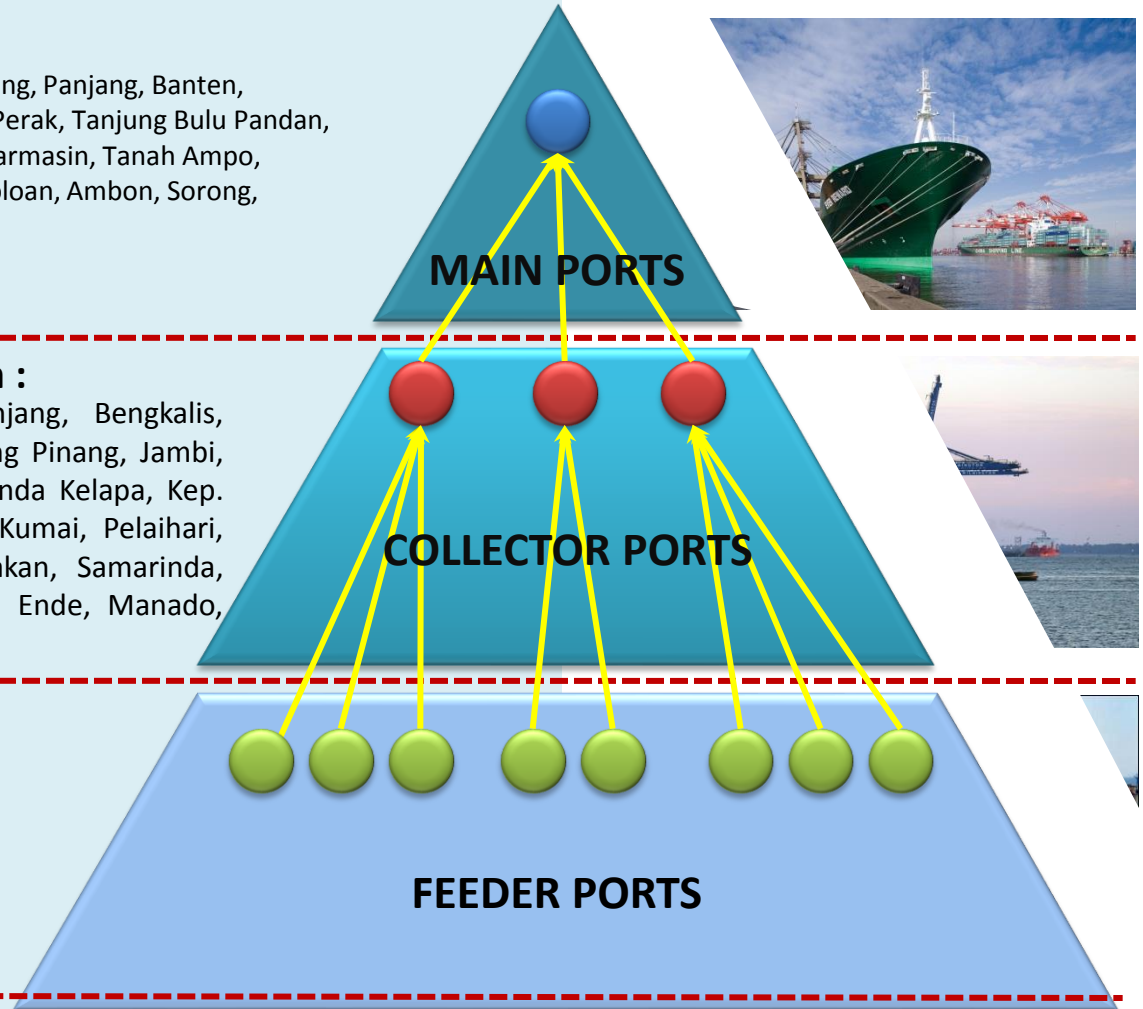
## 217 COLLECTOR PORTS, each of them :

Malahayati, Tanjung Balai Asahan, Selat Panjang, Bengkalis, Tanjung Buton, Pekanbaru, Tanjung Batu, Tanjung Pinang, Jambi, Pangkal Balam, Tanjung Pandan, Bojonegara, Sunda Kelapa, Kep. Seribu, Tegal, Batang, Gresik, Sampang, Bima, Kumai, Pelabuhan, Garongkong, Luwuk, Tangkiang, Nunukan, Tarakan, Samarinda, Maloy, Manado, Banggai, Bau-bau, Waingapu, Ende, Manado, Pare-Pare, Kendari, Biak, Manokwari, Fak-Fak

## 990 FEEDER PORTS, each of them :

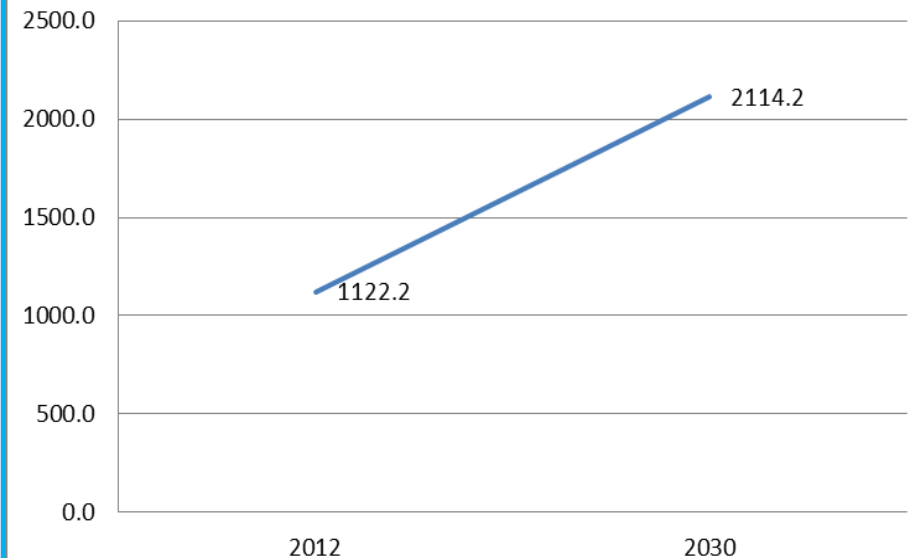
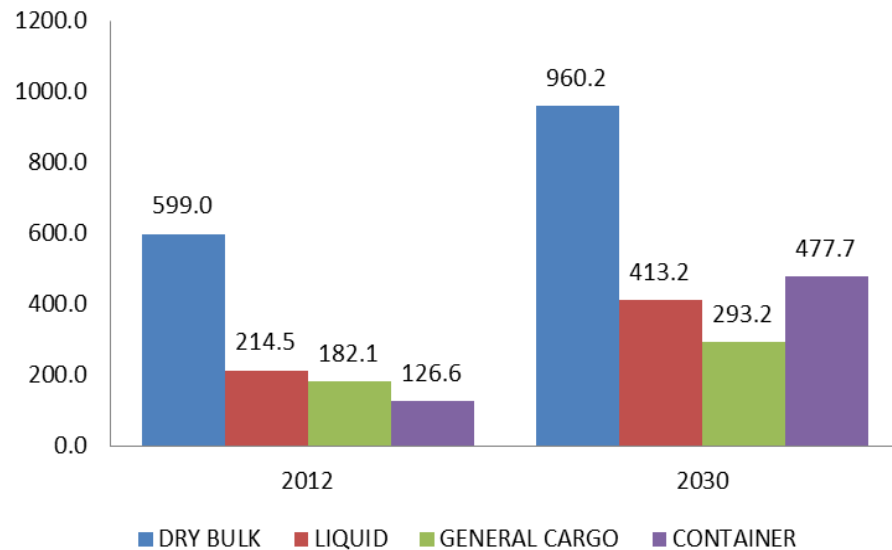
Susoh, Idi, Air Bangis, Serasan, Nipah Panjang, Malakoni, Bagan Siapi-Api, Toboali, Karang Agung, Teluk Betung, Brebes, Jepara, Tuban, Tuban, Buleleng, Sape, Reo, Lirung, Lawele, Jailolo, Sanana, Serui

**TOTAL : 1240 PORTS**



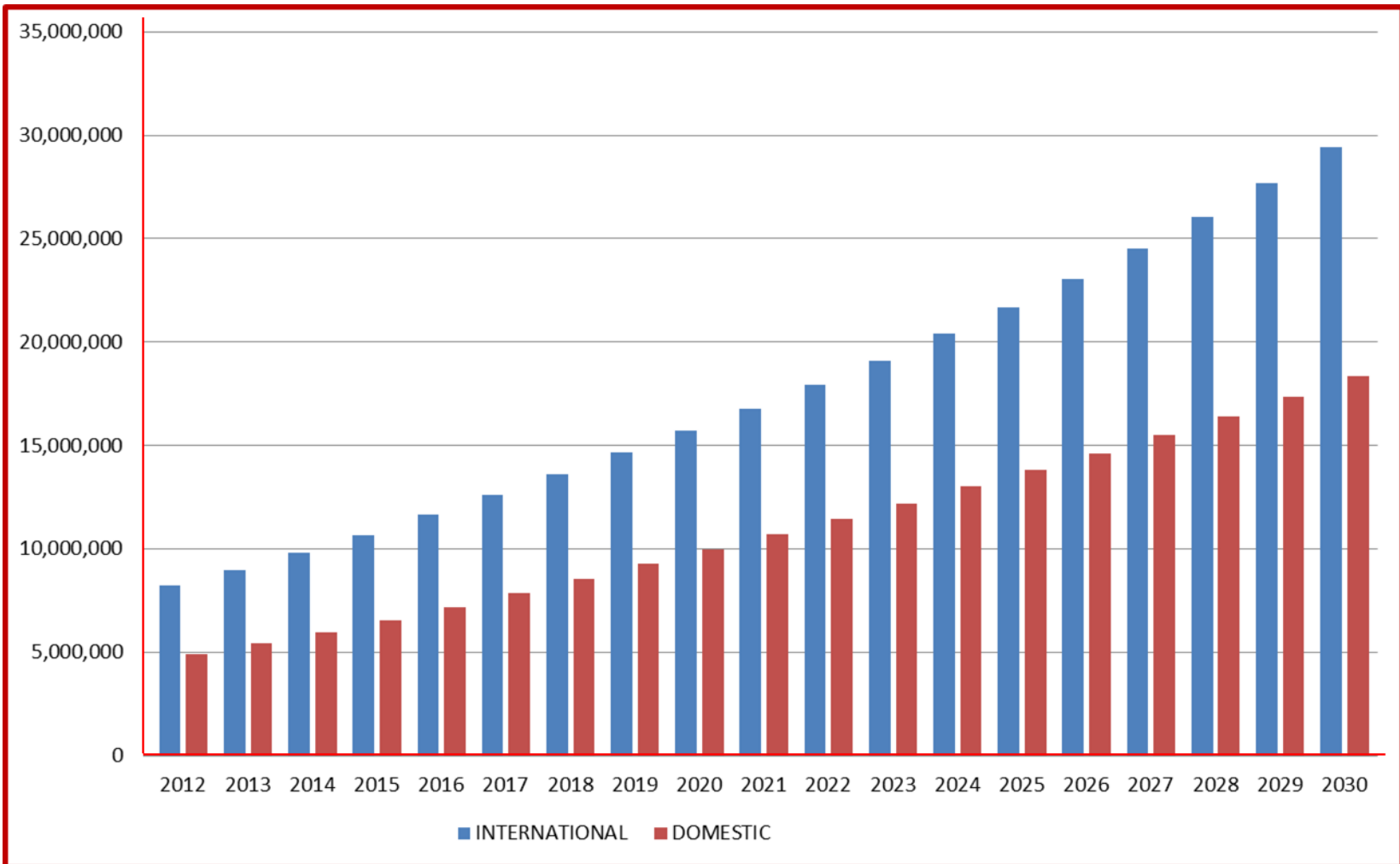
# INDONESIA PORT TRAFFIC

TYPE OF CARGO	YEAR	
	2012 (Million Ton)	2030 (Million Ton)
<b>TOTAL</b>	<b>1122.2</b>	<b>2114.2</b>
<b>DRY BULK</b>	<b>599 (53,4 %)</b> 75% Coal	<b>960.2</b>
<b>LIQUID</b>	<b>214.5 (19,1%)</b> 86 % Petroleum & CPO	<b>413.2</b>
<b>GENERAL CARGO</b>	<b>182.1 (16,2%)</b>	<b>293.2</b>
<b>CONTAINER CARGO</b>	<b>126.6 (11,3%)</b>	<b>477.7</b>



# CONTAINER TRAFFIC FORECAST

	DOMESTIC (TEUs)	INTERNATIONAL (TEUs)	TOTAL (TEUs)
2012	4.768.192	7.873.150	<b>12.641.342</b>
<b>2030</b>	<b>18.344.644</b>	<b>29.423.403</b>	<b>47.768.047</b>



ECONOMIC CORRIDORS	TERMINAL						CDC/ MULTIMODE	CRUISE TERMINAL	LAND/ INFRASTRUC TURE	TOTAL (US\$ BILLION)
	CONTAINER	CPO	PETROL EUM	COAL	OTHERS BULK	OTHERS TERMINAL				
SUMATERA	6.975	1.758	1.395	1.283	0.432	0.163	0.025	-	0.835	12.866
JAVA	8.556	0.008	1.674	0.240	0.236	0.624	0.720	0.620	2.642	15.321
BALI-NT	0.097	-	0.080	-	0.146	0.850	-	0.862	0.373	2.408
KALIMANTAN	0.644	0.550	0.356	1.405	0.535	0.924	-	-	0.213	4.626
SULAWESI	0.477	0.043	0.282	-	0.483	2.053	0.075	-	0.459	3.871
PAPUA	0.550	0.010	0.179	-	0.439	5.443	-	-	1.351	7.972
<b>TOTAL</b>	<b>17.299</b>	<b>2.369</b>	<b>3.965</b>	<b>2.927</b>	<b>2.273</b>	<b>10.058</b>	<b>0.820</b>	<b>1.482</b>	<b>5.872</b>	<b>47.064</b>

## PORT SECTOR INVESTMENT BY ECONOMIC CORRIDOR (US\$ Billion)



# INDICATIVE FUNDING REQUIREMENTS BY PRIVATE AND PUBLIC SECTOR

NO	PLAN	TOTAL		GOVERNMENT		PRIVATE	
		US\$ BILLION	%	US\$ BILLION	%	US\$ BILLION	%
1	2011-2015	12.212	100	5.202	42.6	7.010	57.4
2	2016-2020	12.389	100	3.423	27.6	8.965	72.4
3	2021-2030	22.464	100	6.281	28.0	16.183	72.0
<b>TOTAL</b>		<b>47.064</b>	<b>100</b>	<b>14.906</b>	<b>31.7</b>	<b>32.158</b>	<b>68.3</b>



# GOVERNMENT BUDGET ALLOCATIONS

**YEAR 1990**

**50 MILLION USD**

**YEAR 2013**

**700 MILLION USD**

**YEAR 2014**

**560 MILLION USD**



# CRITICAL INVESTMENT

## Critical Project – Fast Track

Tanjung Priok	New Container Terminals
Tanjung Perak	New Container Terminals
Belawan	Extension of Container Terminal

## Port projects must be completed to next five year

Banjarmasin	New Container Terminal
Batam	Container Terminal
Madura	Development of new port area
Cilamaya (West Java)	Development of new port area
Palembang	General cargo or bulk handling facilities
Kuala Tanjung	New Container Terminal
Panjang	General cargo or bulk handling facilities
Ambon, Dumai, Teluk Bayur, Makassar, Banjarmasin, Bitung, Tanjung Emas, Probolinggo, Balikpapan/Kariangau, Jayapura, Sorong, Pasean, Maloy, Pelabuhan, Sei Gintung, Gorontalo, Pantoloan, Pare-pare.	General Cargo, Container and Bulk Terminal

# **PUBLIC PRIVATE PARTNERSHIP PROJECTS**

## **BIDDING PROCESS :**

- DEVELOPMENT OF CRUISE TERMINAL IN TANAH AMPO
- SURABAYA WEST ACCESS CHANNEL

## **PRIORITY PROJECTS :**

- CILAMAYA PORT DEVELOPMENT PROJECT

## **POTENTIAL PROJECTS :**

- GARONGKONG PORT DEVELOPMENT PROJECT
- BAU-BAU PORT DEVELOPMENT PROJECT
- LUWUK (TANGKIANG) PORT DEVELOPMENT PROJECT
- PROBOLINGGO PORT DEVELOPMENT PROJECT
- MAKASSAR NEW PORT DEVELOPMENT PROJECT



MINISTRY OF TRANSPORTATION - REPUBLIC OF INDONESIA



**Thank you**

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- The Future of the Indonesian Port System and Investment Opportunities: Head of Planning, Ministry of Transportation, Indonesia
- Examining the Key Challenges and Opportunities for Dredging and Reclamation Works at Indonesian Ports: Director of Port and Dredging, Directorate General of Sea Transport, Ministry of Transportation, Indonesia
- Expanding the Makassar New Port (MNP) into a hub for Eastern Indonesia: Deputy Director of Port Facilities, Pelindo IV



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