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)

- ELIMINATING MONOPOLY OF PORT OPERATION
- CREATING COMPETITION AMONG PORTS
- OPEN FOR INVESTMENT
  (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
CREATING HUB INTERNATIONAL PORT

PROVIDING ACCESS TO ALL HINTERLAND MARKETS IN INDONESIA AND SUPPORTING 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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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, Benoa, 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, Bojonegora, Sunda Kelapa, Kep. Seribu, Tegal. Batang, Gresik, Sampang, Bima, Kumai, Pelaihari, 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
<table>
<thead>
<tr>
<th>TYPE OF CARGO</th>
<th>2012 (Million Ton)</th>
<th>2030 (Million Ton)</th>
</tr>
</thead>
<tbody>
<tr>
<td>TOTAL</td>
<td>1122.2</td>
<td>2114.2</td>
</tr>
<tr>
<td>DRY BULK</td>
<td>599 (53.4%)</td>
<td>960.2</td>
</tr>
<tr>
<td></td>
<td>75% Coal</td>
<td></td>
</tr>
<tr>
<td>LIQUID</td>
<td>214.5 (19.1%)</td>
<td>413.2</td>
</tr>
<tr>
<td></td>
<td>86% Petroleum &amp; CPO</td>
<td></td>
</tr>
<tr>
<td>GENERAL CARGO</td>
<td>182.1 (16.2%)</td>
<td>293.2</td>
</tr>
<tr>
<td>CONTAINER CARGO</td>
<td>126.6 (11.3%)</td>
<td>477.7</td>
</tr>
</tbody>
</table>

**INDONESIA PORT TRAFFIC**

- **Total Cargo Traffic**:
  - 2012: 1122.2 Million Ton
  - 2030: 2114.2 Million Ton

- **Dry Bulk**:
  - 2012: 599 Million Ton (53.4%)
  - 2030: 960.2 Million Ton
  - 75% Coal

- **Liquid**:
  - 2012: 214.5 Million Ton (19.1%)
  - 2030: 413.2 Million Ton
  - 86% Petroleum & CPO

- **General Cargo**:
  - 2012: 182.1 Million Ton (16.2%)
  - 2030: 293.2 Million Ton

- **Container Cargo**:
  - 2012: 126.6 Million Ton (11.3%)
  - 2030: 477.7 Million Ton

**Graph**

- **Chart** showing the increase in cargo traffic from 2012 to 2030 for different types of cargo.
CONTAINER TRAFFIC FORECAST

<table>
<thead>
<tr>
<th>Year</th>
<th>DOMESTIC (TEUs)</th>
<th>INTERNATIONAL (TEUs)</th>
<th>TOTAL (TEUs)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>4,768,192</td>
<td>7,873,150</td>
<td>12,641,342</td>
</tr>
<tr>
<td>2030</td>
<td>18,344,644</td>
<td>29,423,403</td>
<td>47,768,047</td>
</tr>
</tbody>
</table>

Bar chart showing container traffic forecast from 2012 to 2030, with projected increases in both domestic and international traffic.
<table>
<thead>
<tr>
<th>ECONOMIC CORRIDORS</th>
<th>TERMINAL</th>
<th>CONTAINER</th>
<th>CPO</th>
<th>PETROL/EUM</th>
<th>COAL</th>
<th>OTHERS BULK</th>
<th>OTHERS TERMINAL</th>
<th>CDC/MULTIMODE</th>
<th>CRUISE TERMINAL</th>
<th>LAND/INFRASTRUCTURE</th>
<th>TOTAL (US$ BILLION)</th>
</tr>
</thead>
<tbody>
<tr>
<td>SUMATERA</td>
<td></td>
<td>6.975</td>
<td>1.758</td>
<td>1.395</td>
<td>1.283</td>
<td>0.432</td>
<td>0.163</td>
<td>0.025</td>
<td></td>
<td>-</td>
<td>0.835</td>
</tr>
<tr>
<td>JAVA</td>
<td></td>
<td>8.556</td>
<td>0.008</td>
<td>1.674</td>
<td>0.240</td>
<td>0.236</td>
<td>0.624</td>
<td>0.720</td>
<td>0.620</td>
<td>2.642</td>
<td>15.321</td>
</tr>
<tr>
<td>BALI-NT</td>
<td></td>
<td>0.097</td>
<td>-</td>
<td>0.080</td>
<td>-</td>
<td>0.146</td>
<td>0.850</td>
<td>-</td>
<td>-</td>
<td>0.862</td>
<td>0.373</td>
</tr>
<tr>
<td>KALIMANTAN</td>
<td></td>
<td>0.644</td>
<td>0.550</td>
<td>0.356</td>
<td>1.405</td>
<td>0.535</td>
<td>0.924</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>0.213</td>
</tr>
<tr>
<td>SULAWESI</td>
<td></td>
<td>0.477</td>
<td>0.043</td>
<td>0.282</td>
<td>-</td>
<td>0.483</td>
<td>2.053</td>
<td>0.075</td>
<td>-</td>
<td>-</td>
<td>0.459</td>
</tr>
<tr>
<td>PAPUA</td>
<td></td>
<td>0.550</td>
<td>0.010</td>
<td>0.179</td>
<td>-</td>
<td>0.439</td>
<td>5.443</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>1.351</td>
</tr>
<tr>
<td>TOTAL</td>
<td></td>
<td>17.299</td>
<td>2.369</td>
<td>3.965</td>
<td>2.927</td>
<td>2.273</td>
<td>10.058</td>
<td>0.820</td>
<td>1.482</td>
<td>5.872</td>
<td>47.064</td>
</tr>
</tbody>
</table>

PORT SECTOR INVESTMENT BY ECONOMIC CORRIDOR (US$ Billion)
<table>
<thead>
<tr>
<th>NO</th>
<th>PLAN</th>
<th>TOTAL</th>
<th>GOVERNMENT</th>
<th>PRIVATE</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>US$ BILLION</td>
<td>%</td>
<td>US$ BILLION</td>
</tr>
<tr>
<td>1</td>
<td>2011-2015</td>
<td>12.212</td>
<td>100</td>
<td>5.202</td>
</tr>
<tr>
<td>2</td>
<td>2016-2020</td>
<td>12.389</td>
<td>100</td>
<td>3.423</td>
</tr>
<tr>
<td>3</td>
<td>2021-2030</td>
<td>22.464</td>
<td>100</td>
<td>6.281</td>
</tr>
<tr>
<td></td>
<td>TOTAL</td>
<td>47.064</td>
<td>100</td>
<td>14.906</td>
</tr>
</tbody>
</table>
GOVERNMENT BUDGET ALLOCATIONS

YEAR 1990
50 MILLION USD

YEAR 2013
700 MILLION USD

YEAR 2014
560 MILLION USD
### Critical Project – Fast Track

<table>
<thead>
<tr>
<th>Location</th>
<th>Project Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tanjung Priok</td>
<td>New Container Terminals</td>
</tr>
<tr>
<td>Tanjung Perak</td>
<td>New Container Terminals</td>
</tr>
<tr>
<td>Belawan</td>
<td>Extension of Container Terminal</td>
</tr>
</tbody>
</table>

### Port projects must be completed to next five years

<table>
<thead>
<tr>
<th>Location</th>
<th>Project Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Banjarmasin</td>
<td>New Container Terminal</td>
</tr>
<tr>
<td>Batam</td>
<td>Container Terminal</td>
</tr>
<tr>
<td>Madura</td>
<td>Development of new port area</td>
</tr>
<tr>
<td>Cilamaya (West Java)</td>
<td>Development of new port area</td>
</tr>
<tr>
<td>Palembang</td>
<td>General cargo or bulk handling facilities</td>
</tr>
<tr>
<td>Kuala Tanjung</td>
<td>New Container Terminal</td>
</tr>
<tr>
<td>Panjang</td>
<td>General cargo or bulk handling facilities</td>
</tr>
<tr>
<td>Ambon, Dumai, Teluk Bayur, Makassar, Banjarmasin, Bitung, Tanjung Emas, Probolinggo, Balikpapan/Kariangau, Jayapura, Sorong, Pasean, Maloy, Pelaihari, Sei Gintung, Gorontalo, Pantoloan, Pare-pare.</td>
<td>General Cargo, Container and Bulk Terminal</td>
</tr>
</tbody>
</table>
### 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
Thank you
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Featuring:
- 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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