



8th ASEAN Ports Conference

Indonesia: A National Strategy

Law 17/2008

- (1) NPMP should cover the location, development, construction and operation of ports
 - (2) NPMP is to consider
 - a. national, provincial and local spatial plans
 - b. regional socio-economy development (and potential)
 - c. natural resources
 - d. strategic economic initiatives (growth triangles)
 - (3) NPMP is to contain:
 - a. national port policy
 - b. location plan and chain of command
 - (4) Plan to be for a period of 20 (twenty) years
 - (5) NPMP to be reviewed every 5 years
 - (6) NPMP can be reviewed after special events
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National Port Plan

Long terms needs

- Trade, commodities, transit....
- Productivity, service standards,
- Ports areas and terminals

Planning Guidelines

- Demand
- Zoning, supporting infrastructure

Industry Structure

- PPP, Competition,
- Unions, Stevedores....

Human Resources

Vision for 2030...

Long terms needs

- Trade, commodities, transit....
- Productivity, service standards,
- Ports areas and terminals

Planning Guidelines

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Industry Structure

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- Unions, Stevedores....

Human Resources

Forecast Method

Different methods used to ensure veracity

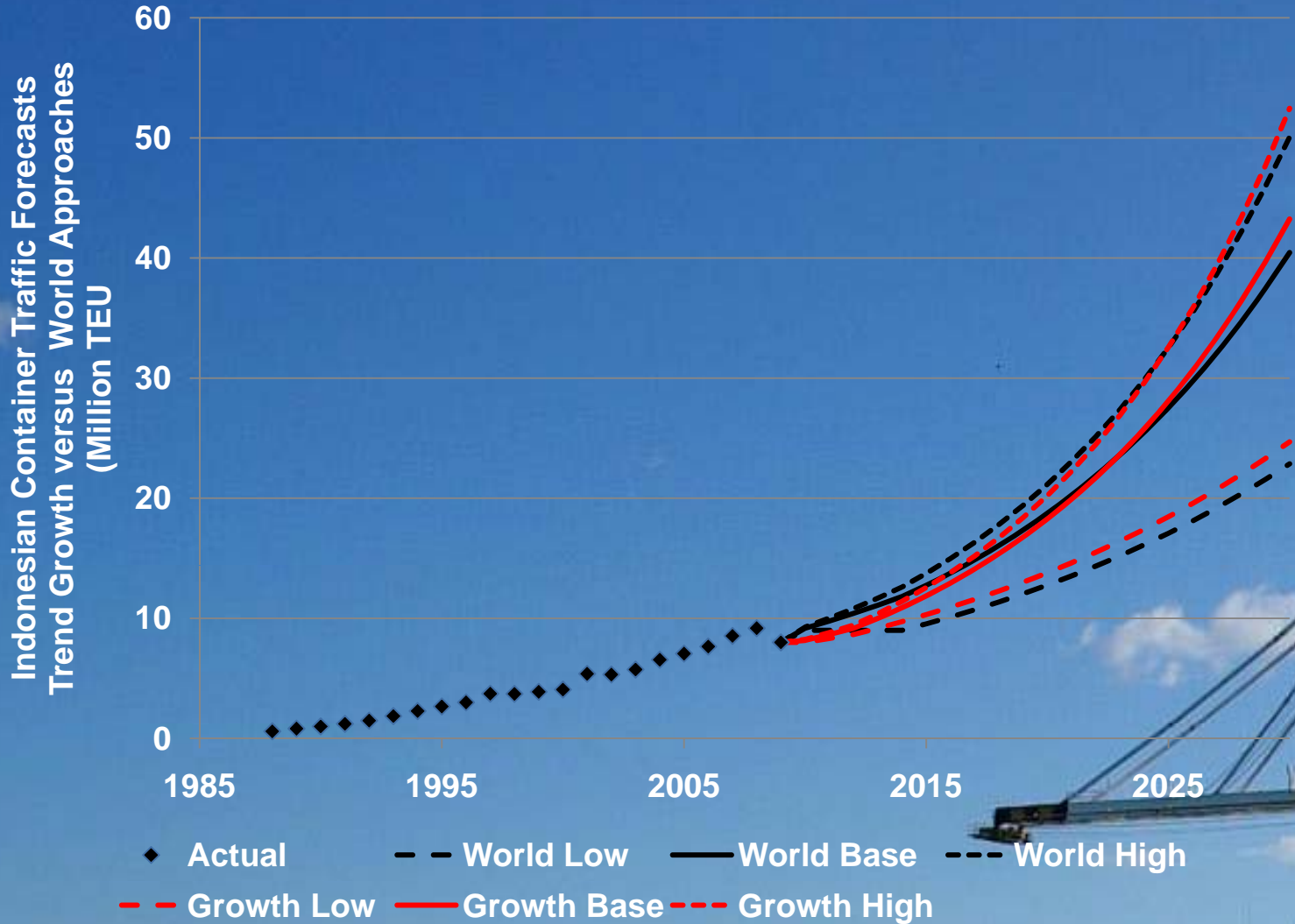
Container/general cargo:

- From trends of container and general cargo growth and growth assessments
- Top down, from overall world forecast

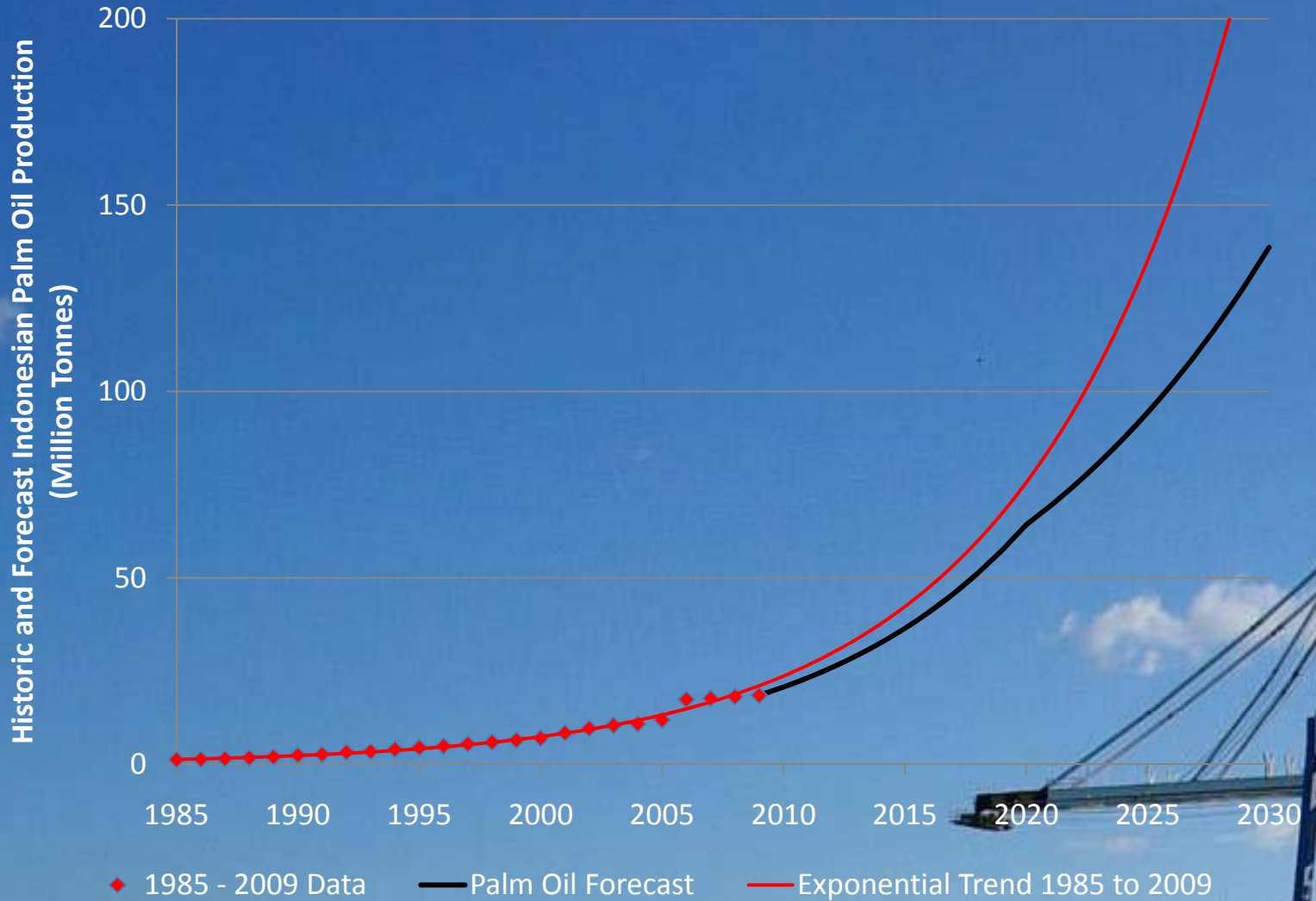
Commodities:

- Bottom up from resource developments
- Comparators with similar countries/regions or “growth” targets

Containers



Crude Palm Oil



Petroleum Products

<i>Year</i>	<i>Crude Prod.</i>	<i>Crude Exports</i>	<i>Crude Imports</i>	<i>Product Exports</i>	<i>Product Imports</i>	<i>Dom. Demand</i>
Actual / Est.						
1996	90.4	38.3	9.3	10.7	10.1	60.9
2000	83.4	29.2	11.5	8.8	14.0	70.8
2005	62.3	21.5	15.6	6.0	21.1	71.5
2006	59.5	18.1	14.6	7.0	18.7	67.6
2007	56.3	18.2	15.1	6.3	19.5	66.5
2008	56.8	18.2	12.7	5.7	22.4	68.0
% growth 96/08	-3.80	-5.99	2.62	-5.07	6.83	0.92
Forecast						
2009	55.0	18.0	12.0	5.0	21.0	65.0
2010	52.8	17.8	11.9	5.0	25.0	67.0
2015	43.1	16.9	11.3	4.7	44.9	77.6
2020	35.1	16.1	10.7	4.5	64.7	90.0
2030	23.3	14.6	9.7	4.0	106.5	120.9
% growth 09/30	-4.00	-1.00	-1.00	-1.00	8.04	3.00

Forecast Headlines

In 2030 the National Port System to handle

- 500 mtpa of Coal
- 420 mtpa or 42 m TEU
- 150 mtpa of Crude Palm Oil
- 107 mtpa of import petroleum products
- Other commodities

Key changes

- Large scale petroleum product imports
 - CPO volume will increase 800%
 - Container volume will increase 500%
 - Coal will increase by 300% to 2030
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Ports in 2030

	Conts.	Pet.	Coal	CPO	Rice	Cocoa	Fish
North Sumatra/Aceh	56.6	14.4	0.0	92.0	0.8	0.0	0.0
West Kalimantan	7.2	1.8	100.0	9.5	0.1	0.0	0.0
South Sumatra	30.3	7.7	100.0	24.9	0.4	0.0	0.0
Java	227.7	58.0	0.00	0.4	3.3	0.0	0.0
Bali and eastward	21.8	5.6	0.00	0.0	0.3	0.0	0.0
Kalimantan	22.7	5.8	300.0	17.4	0.3	0.0	0.0
Western Sulawesi	19.5	5.0	0.0	4.8	0.3	3.0	1.5
The East	34.0	8.7	0.0	1.1	0.5	0.0	2.0
Total	420.0	107.0	500.0	150.0	6.0	3.0	3.5
Total 2009	80.0	15.0	200.0	20.0	1.00	1.0	2.0



Shipping

Do not ignore shipping...

Primary means of cargo transport

Need coastal tanker fleet

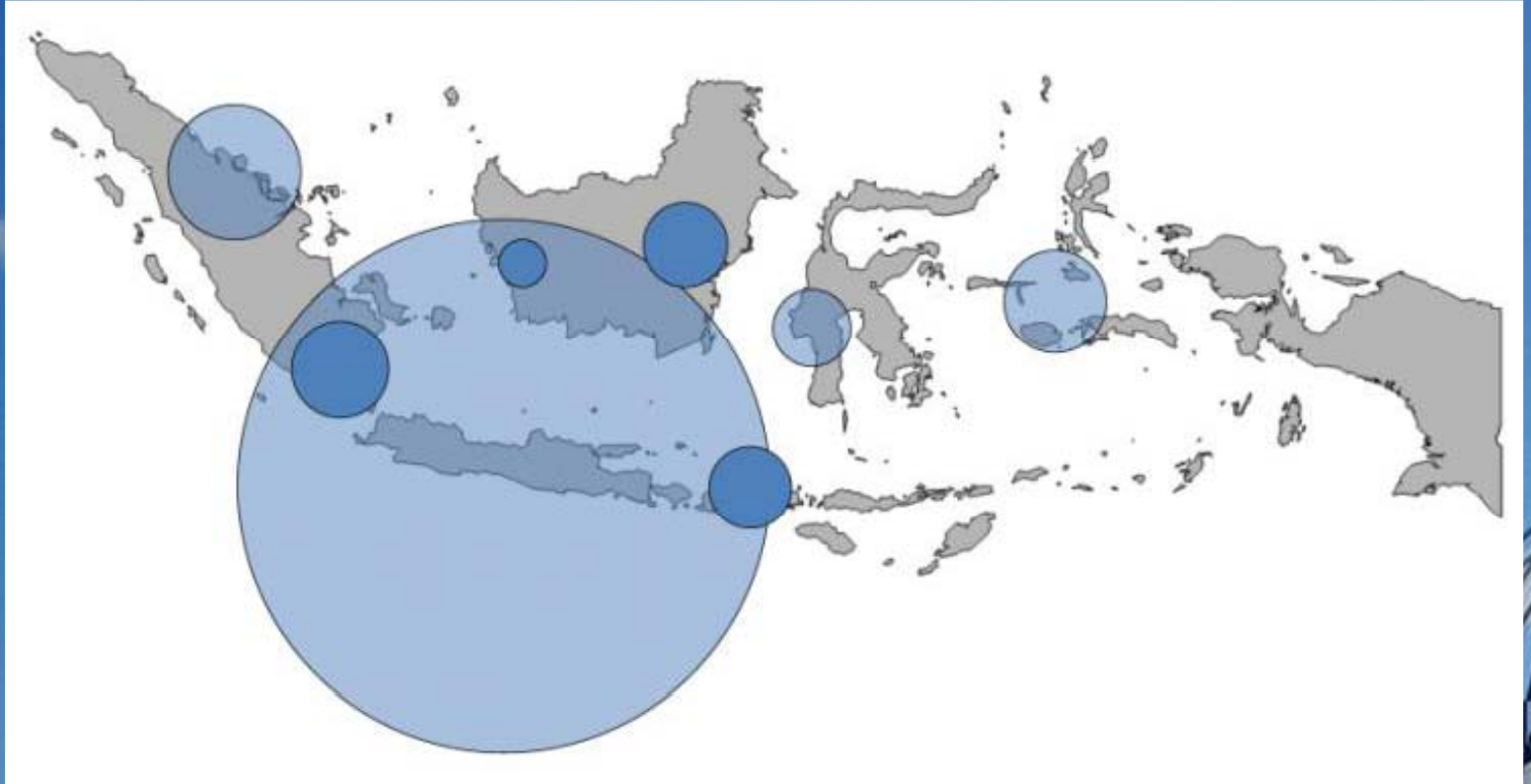
Need competitive domestic liners

Need small bulk carriers



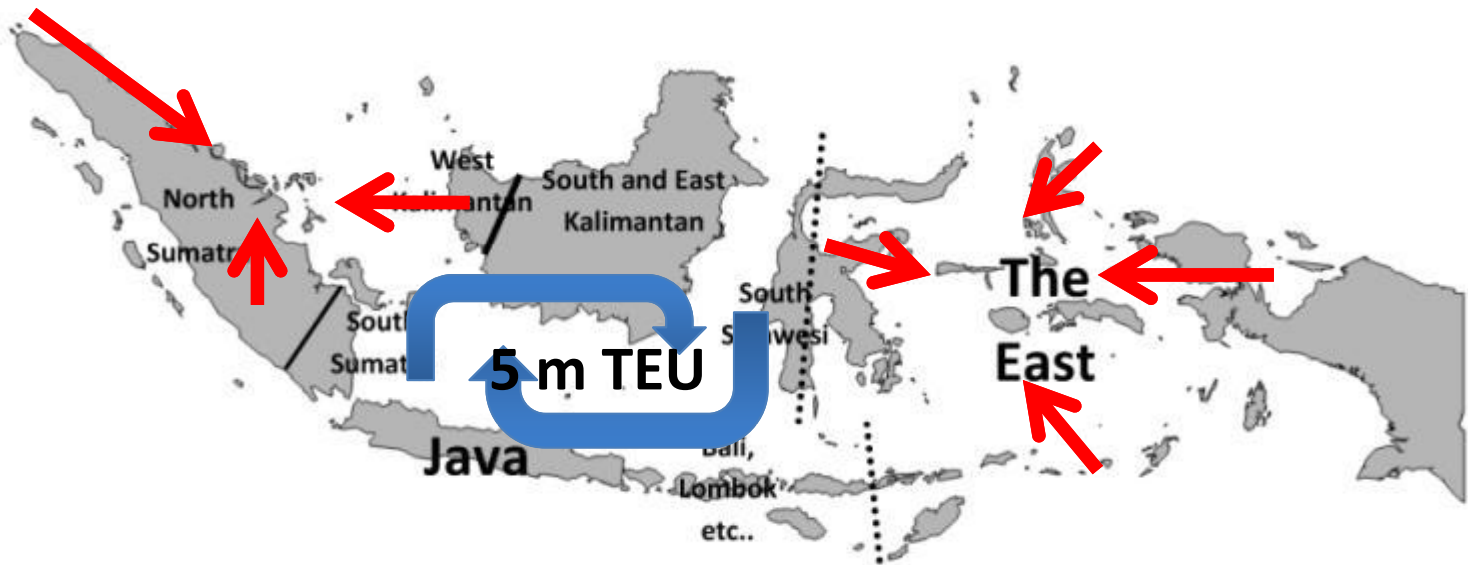
Container Shipping

Container Distribution



Hinterlands

There are some clear hinterlands and region where concentrating cargo flows makes sense.



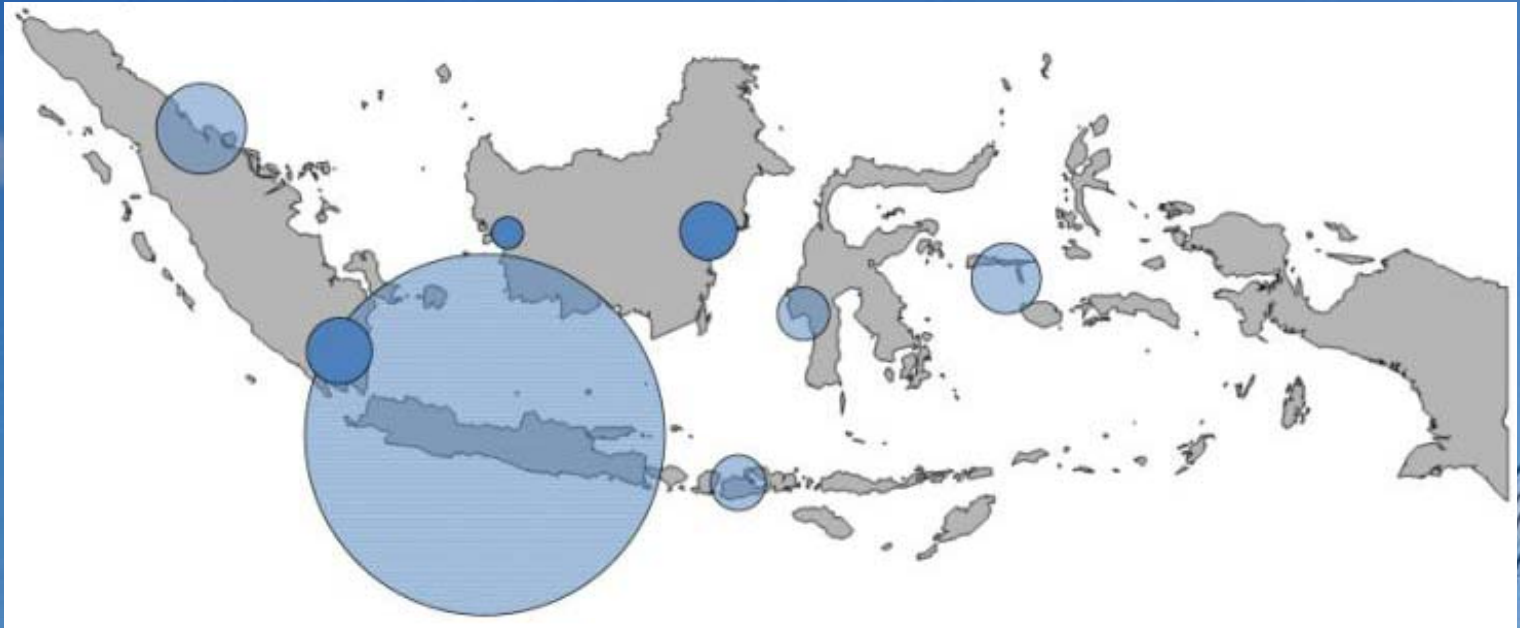
Domestics Container Trade

- Current and future ship sizes
 - 300-500 TEU feeder vessels
 - 1,000-2,000 TEU short route line/feeder
 - 2,000-4,000 TEU+
 - Carrying potential
 - Feeders: 30,000 to 50,000 per year
 - Short liner: 100,000 ish per year
 - “Intra” Indonesia: 150,000+ per year
 - Routes and volumes
 - Semarang, 2,000,000 TEU?
 - Makassar, 1,000,000+ TEU
 - Benoa, Palembang, Jambi, Banjarmasin
500,000+ TEU
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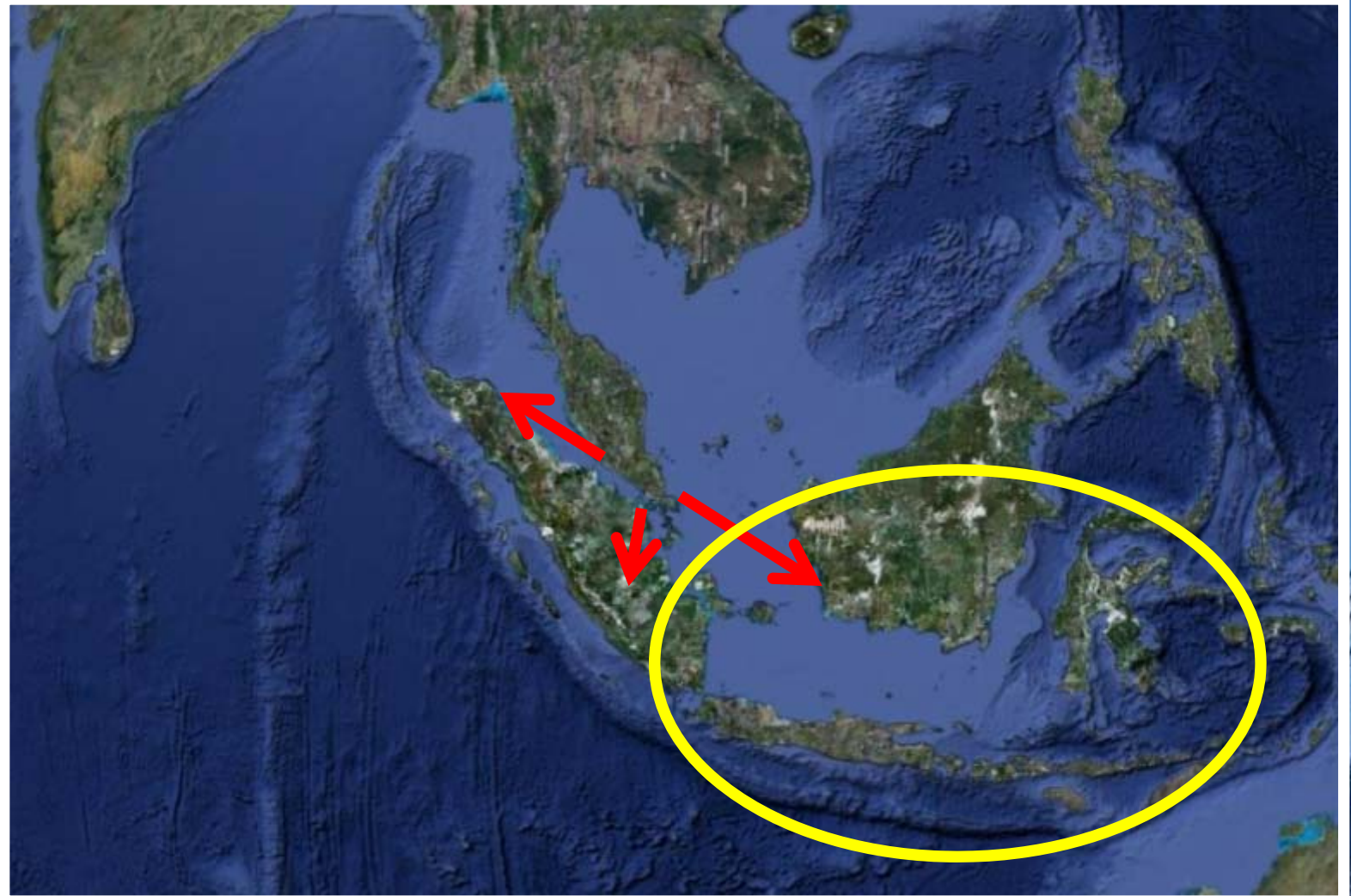


Tankers

Petroleum Products



In context



Tankers and Indonesia

- Current domestic tankers
 - Limited availability of 80,000 DWT
 - Makassar 30,000 DWT
- Distribution volumes in 2030
 - Makassar, 10 mt
 - Kalimantan, 7 mt
- Tanker scaling
 - Load, transport, discharge cycle 7 days?
 - 200,000 mt per week
 - Tanker sizing 50,000 to 100,000 DWT



Ports

Major New Terminals

Major common user coal terminals

- Attracting added value
- Enabling exports
- Blending

Large expansion of container capacity

- Specialist facilities across country
- Large transshipment capability
- Direct calls to Intrasian/US/Europe

Petroleum Import Terminals

- Mainly common user

CPO Terminals

- Common user as well as dedicated
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Container Terminals

	<i>Containers</i>		<i>Productivity (TEU/yr)</i>			<i>Port Demand</i>		
	<i>TEU</i>	<i>t</i>	<i>Berth (m)</i>	<i>Crane</i>	<i>Area (Ha)</i>	<i>Berth (m)</i>	<i>Crane</i>	<i>Area (Ha)</i>
N Sumatra	5.66	56.6	2,000	150k	20k	2,831	38	283
W Kalimantan	0.72	7.2	1,000	150k	20k	721	5	36
S Sumatra	3.03	30.3	1,000	150k	20k	3,031	20	152
Java	22.77	227.7	2,000	150k	20k	11,386	152	1,139
Bali +++	2.18	21.8	1,000	150k	20k	2,184	15	109
Kalimantan	2.28	22.7	1,000	150k	20k	2,275	15	114
W Sulawesi	1.95	19.5	1,000	150k	20k	1,951	13	98
The East	3.40	34.1	1,000	150k	20k	3,405	23	170
Including Transshipment								
West Java	18.10	181.0	2,000	150k	20k	9,050	121	905
East Java	8.20	82.0	2,000	150k	20k	4,100	55	410

Product Terminals

	<i>Petroleum</i>	<i>Productivity</i>		<i>Port Demand</i>	
		<i>Storage (m³/m²)</i>	<i>Berths</i>	<i>Storage (Ha)</i>	<i>Berths</i>
North Sumatra	14.42	2	2.0	180	21
West Kalimantan	1.84	2	1.0	23	3
South Sumatra	7.72	2	1.0	97	21
Java	58.02	2	2.0	725	87
Bali and eastward	5.56	2	1.0	70	15
Kalimantan	5.80	2	1.0	72	15
Western Sulawesi	4.97	2	1.0	62	12
The East	8.67	2	1.0	108	24

CPO Terminals

	<i>CPO</i>	<i>Productivity</i>		<i>Port Demand</i>	
		<i>Storage</i>	<i>Berths</i>	<i>Storage</i>	<i>Berths</i>
North Sumatra/Aceh	91.97	72	3.0	128	31
West Kalimantan	9.46	48	3.0	20	3
South Sumatra	24.87	48	3.0	52	8
Kalimantan	17.35	48	3.0	36	6
Western Sulawesi	4.77	48	3.0	10	2

Key Investments

Java

- 9 km of container quay, 120 STS cranes and 900 Ha of storage area
- 4 km of container quay in East Java with over 55 STS cranes and 410 Ha of Storage
- 80 or more petroleum products berths with over 700 Ha of storage terminal
- Investment over US\$ 20 billion

Key Investments

Southern Sumatra

- 3 km of container quay, 20 STS cranes and 152 ha of storage area
- A large petroleum products terminal
- A 100 mtpa coal terminal and CPO terminals
- Investment over US\$ 2 billion

Bali

- 2 major cruise terminals
- Improved roro links to Java
- Petroleum product distribution terminals
- Investment over US\$ 0.5 billion

Key Investments

Northern Sumatra

- 4km of container quay, 40 STS cranes and 300 Ha of storage area
- 3 to 6 major petroleum storage terminals
- 10 to 20 CPO terminals
- Investment over US\$ 5 billion

West Kalimantan

- Container Terminals
- CPO Terminals
- Coal Terminals?
- Investment over US\$ 0.5 billion

Key Investments

West Sulawesi

- 2 km of container quay, 15 STS cranes and 100 Ha of storage area
- A major petroleum products terminal
- A common use CPO and agri-bulk terminals
- Investment over US\$ 1.5 billion

South and East Kalimantan

- 2.5 km of container quay, 15 STS crane and 120 Ha of storage area
 - 3/4 coal terminals of 100 mtpa capacity
 - Petroleum products and CPO terminals
 - Investment over US\$ 10 billion
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Key Investments

The Maritime East

- 4 km of container quay, 25 STS cranes and 200 Ha of storage area
- Substantial consolidation and logistics support facilities
- A major petroleum products terminal
- Investment over US\$ 2 billion



Thank you for your attention
