



Asean Ports and Shipping 2023

Perspectives on New Economic Initiatives, Trends and Developments in the Intermodal and Ports Industry in the ASEAN Region

01 November 2023

Captain Hemant Gupta FNI



Drewry: Maritime Research and Consulting Services

01

Drewry is the leading international provider of research and consulting services to the maritime and shipping industry

50

Founded in **1970**: More than **50** years continuously charting and assessing the world's maritime markets

SECTORS COVERED

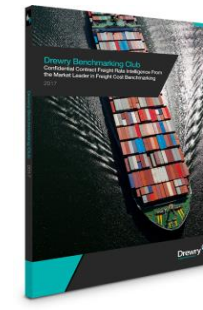
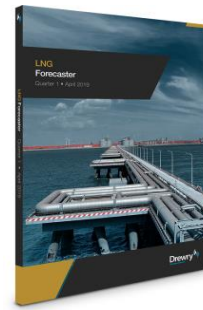
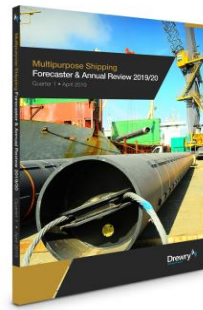
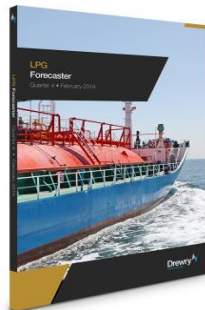
- Dry Bulk Shipping
- Containers
- Ports and terminals
- Tanker Shipping (Product/Crude)
- Chemical Shipping
- LNG / LPG
- general cargo Shipping
- Ship Operations
- Reefer

RESEARCH TYPES

- Monthly market insights
- Quarterly market forecasts
- Annual sector reviews and forecasts
- Spotlight analysis/Special situations
- Impact analysis

AREAS OF EXPERTISE

- Market analysis
- Strategy and Planning
- Market entry strategy
- Commercial due diligence
- Technical due diligence
- Transactional and bid support
- IPO support
- Financial advisory

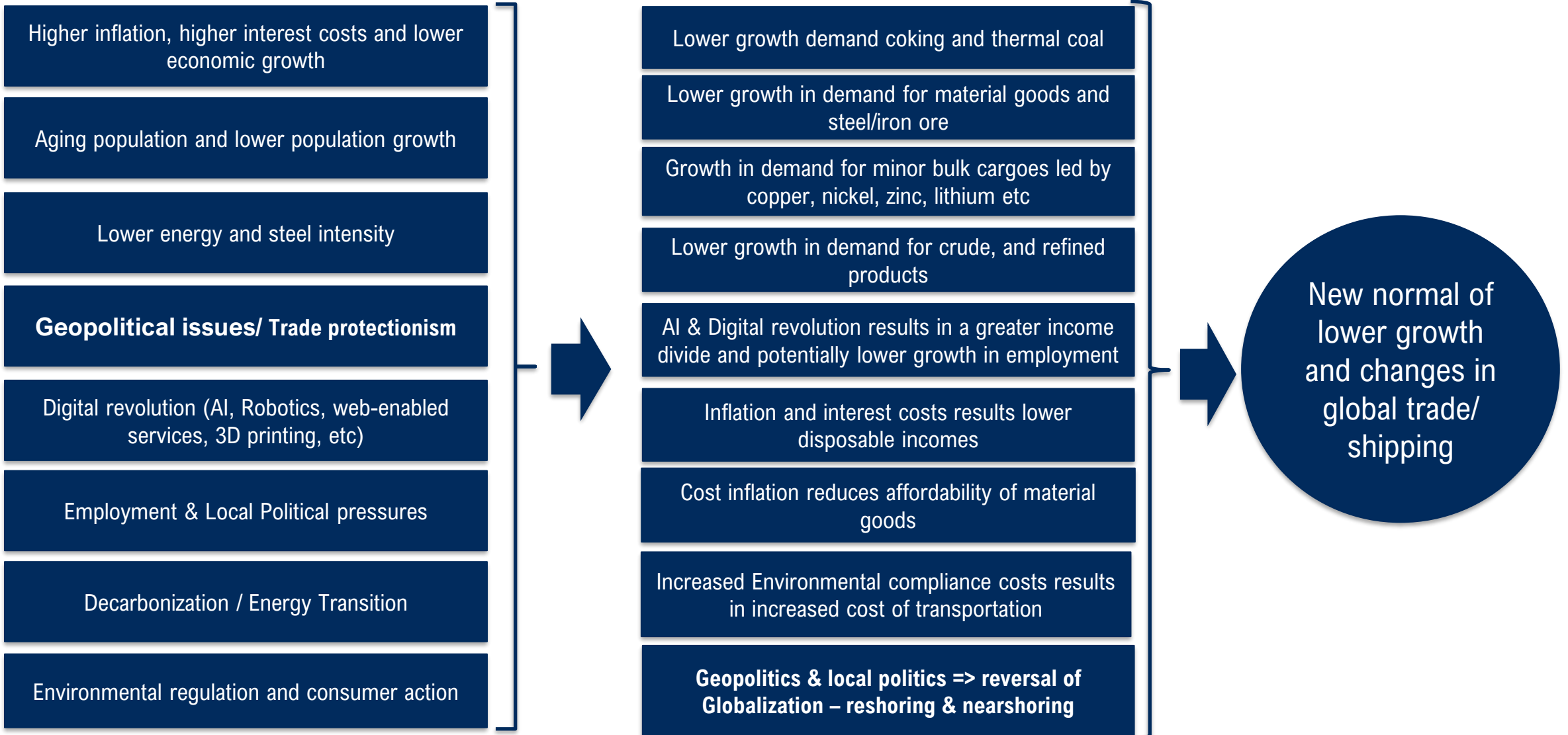




Global Economic Megatrends



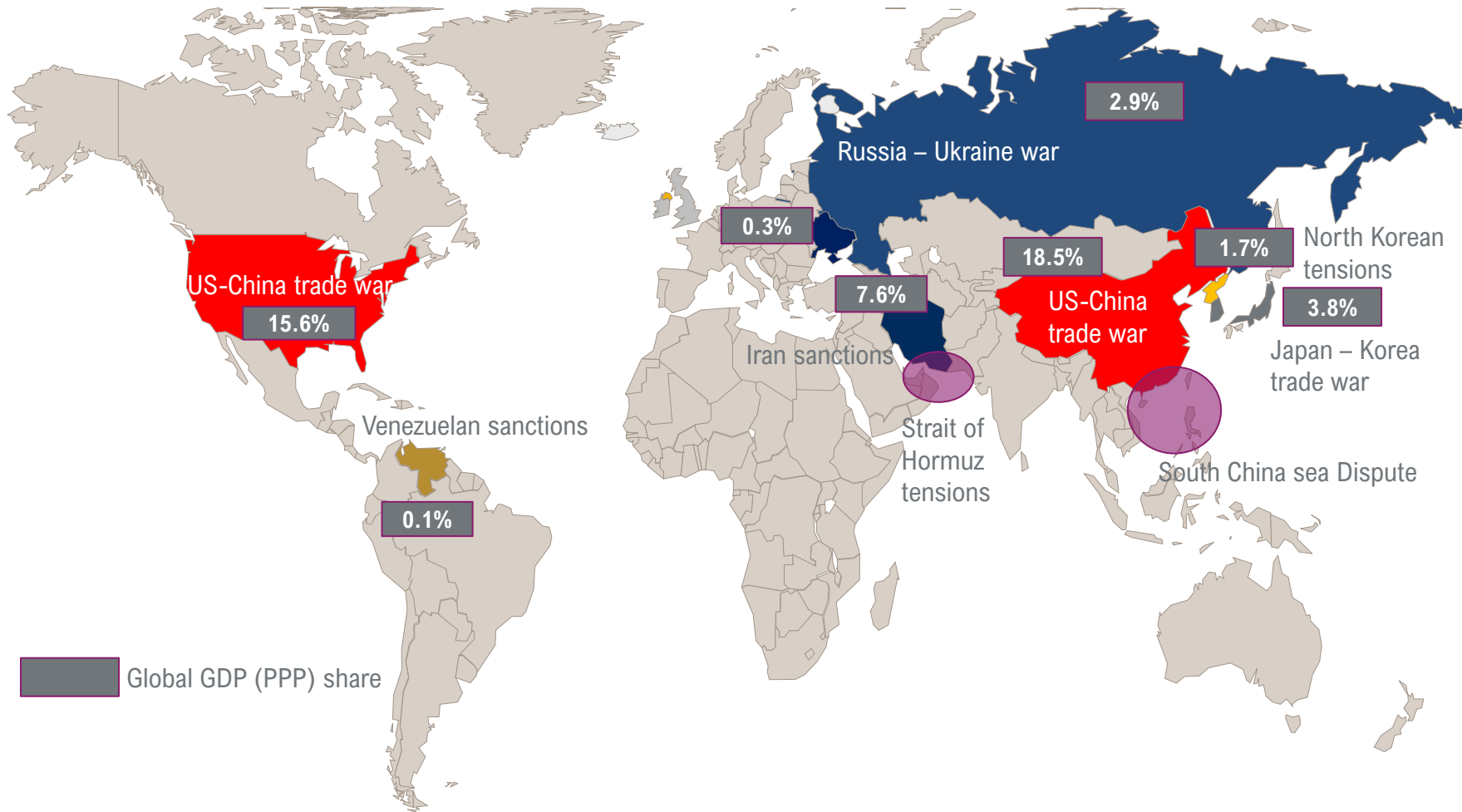
Megatrends impacting World Economic Growth Outlook



Geopolitical developments directly affecting ~ 50% of global GDP

Key takeaway

- Geopolitical risk is no longer a tail risk.
- It is directly affecting over 50% of global GDP.
- Changes in trade flow
- Realignment in the supply chain (China+1/2 strategy)



Note: Percentage reflects share of respective countries in global GDP (in PPP terms)

Source: IMF for GDP in PPP terms

PPP: Purchasing Power Parity

Impact of US-China trade war and Russia-Ukraine war

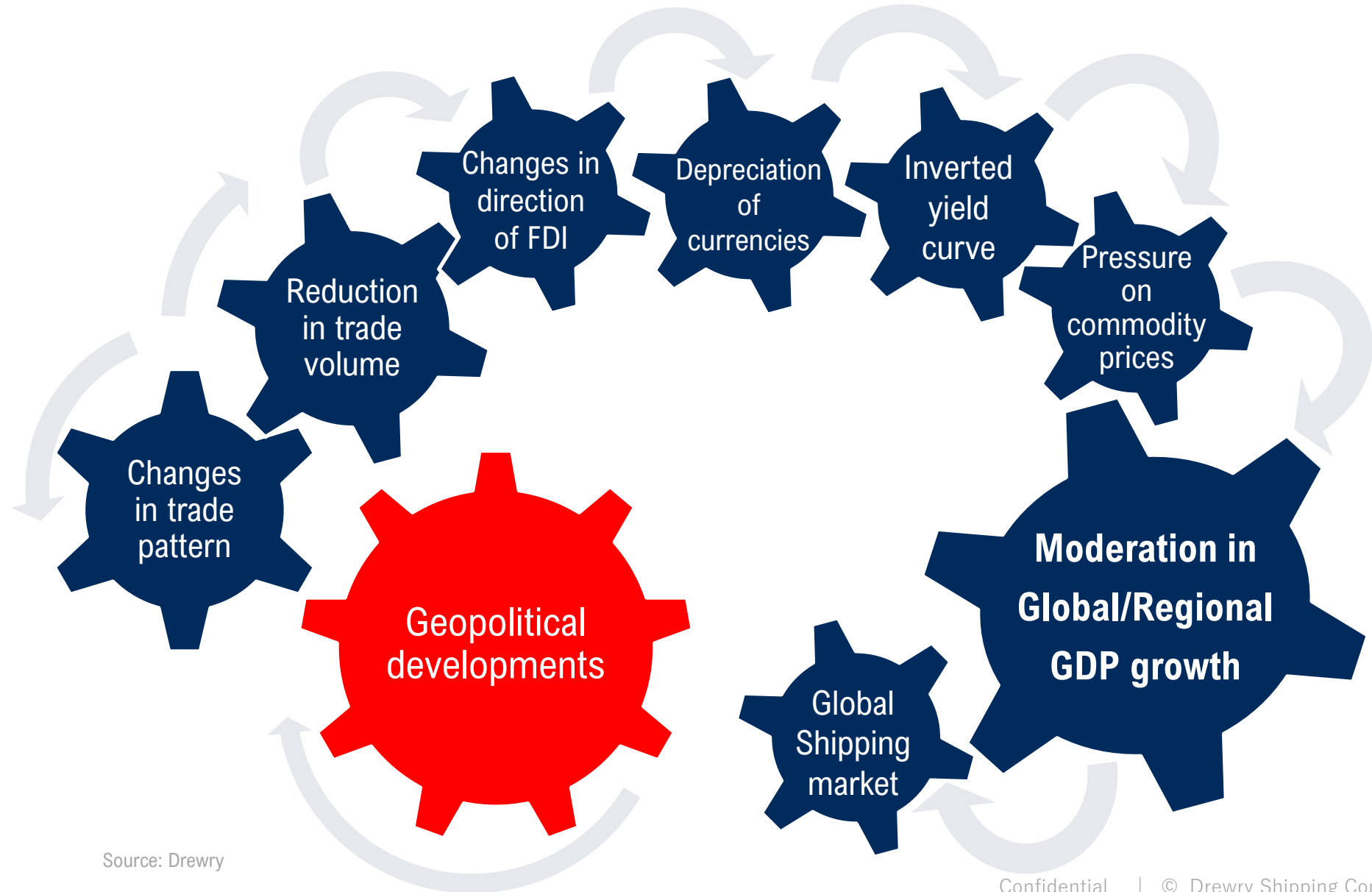
US-China trade war

US-China Trade War and its impact		
Diversified Supply Chain <ul style="list-style-type: none">• Increase in investment in SEA, SA	Increase in investment closer to the consumption centres and Friendshoring <ul style="list-style-type: none">• Increasing investment in Mexico, E Europe	De-dollarisation but will continue to play an important role <ul style="list-style-type: none">• Fall in dollar reserve• Increasing transaction in other currencies• Increasing bilateral currency deals

Russia-Ukraine war



Impact of geopolitical landscape on shipping: hard to quantify



Source: Drewry

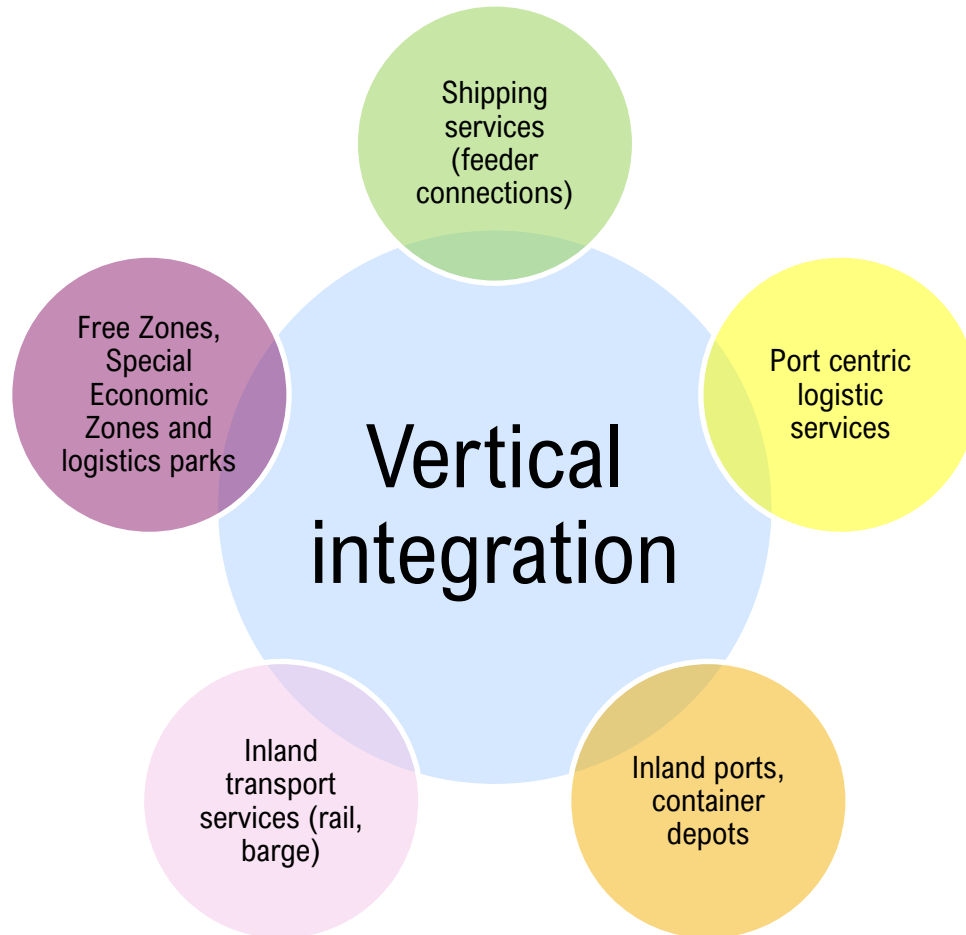


Trends and Developments in the Intermodal and Ports Industry

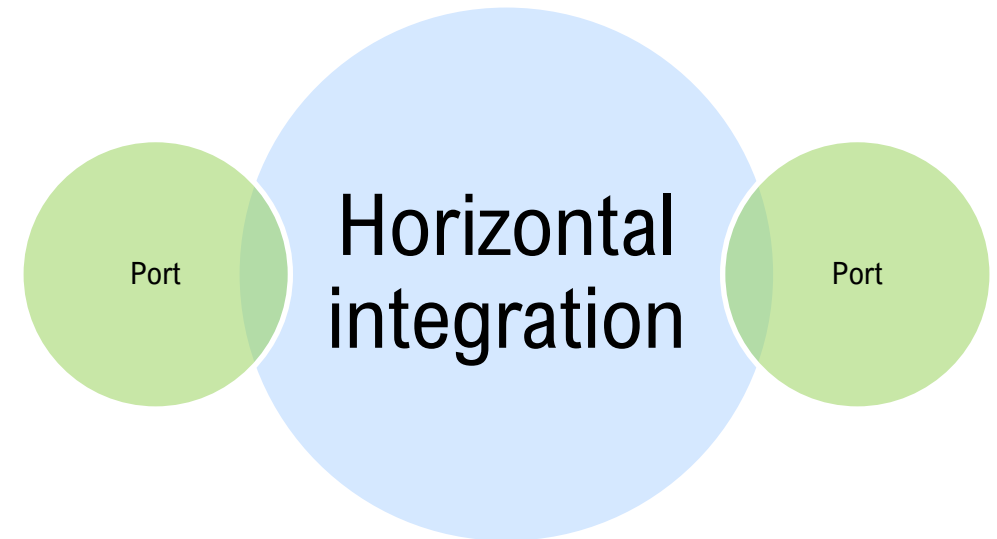


Vertical and horizontal integration strategies

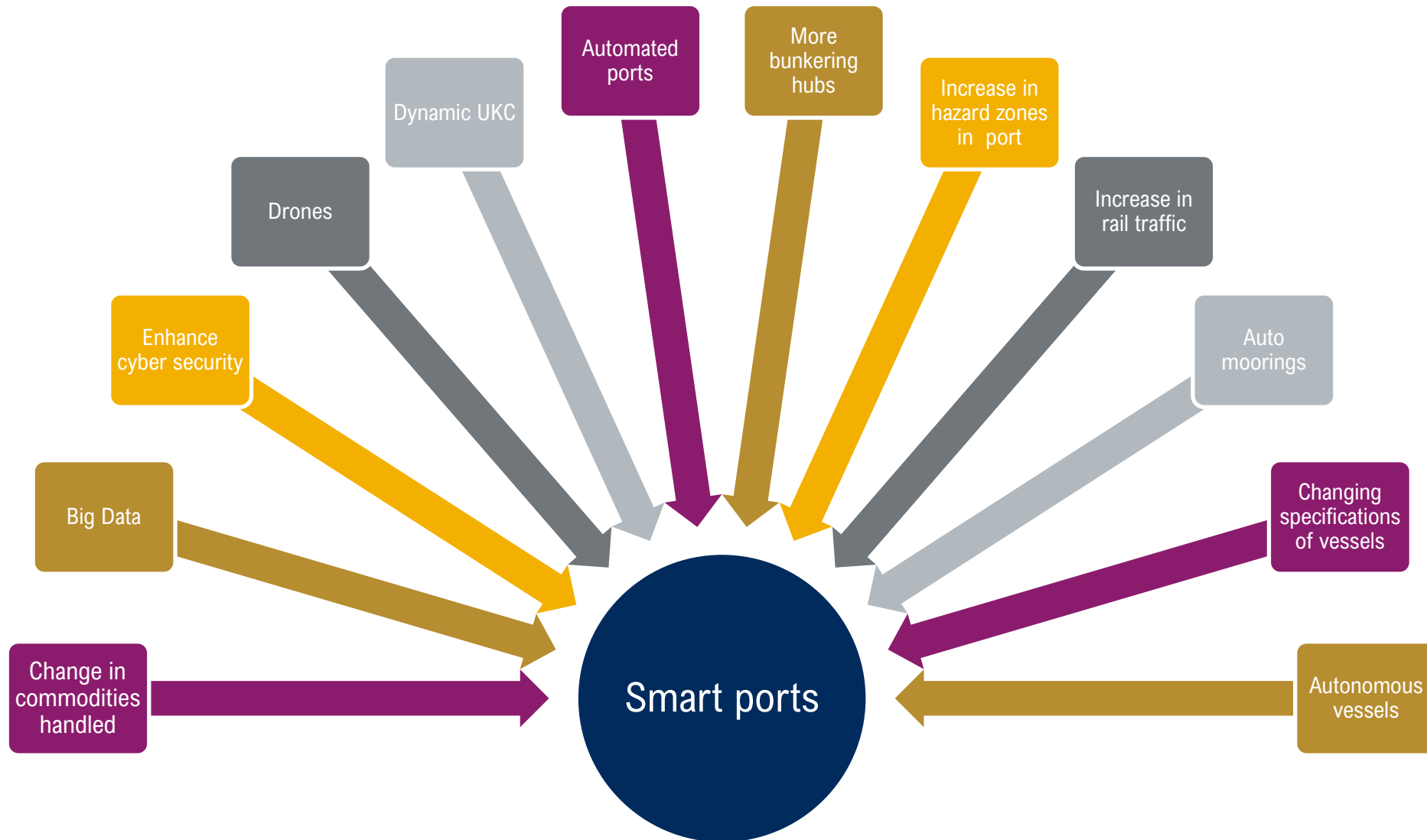
Vertical integration strategies



Horizontal integration strategies



Emerging trends for ports

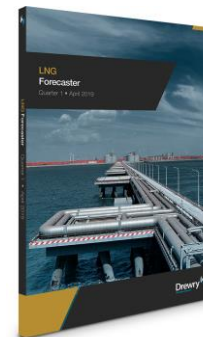
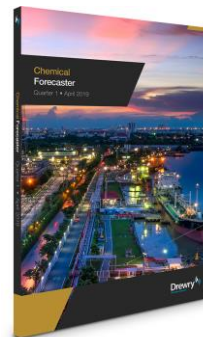
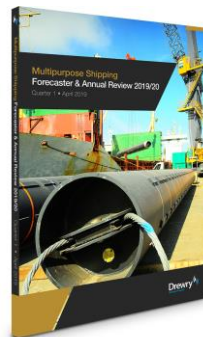
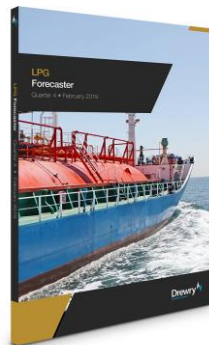


Principal source of material used for the presentation

Drewry Research Reports

- Dry Bulk Forecaster
- Crude Tanker Forecaster
- Product Tanker Forecaster
- Chemical Tanker Forecaster
- LPG Forecaster
- LNG Forecaster
- Container Forecaster
- Ports and Terminal Insight
- Container Freight Rate Insight
- Drewry AIS database

Thank you!!





LONDON

DELHI

SINGAPORE

SHANGHAI