

8TH PHILIPPINE PORTS AND SHIPPING 2015

Opportunities for Shipping Lines in the Philippines



The Peninsula Manila
Makati City, Philippines
12 February 2015



DANIEL VENTANILLA
NYK LINE PHILIPPINES
NYK FILJAPAN SHIPPING CORPORATION
TRANSNATIONAL DIVERSIFIED GROUP (TDG)



- *Global and Regional Trends*
- *Domestic Updates and Challenges*
- *Logistics Opportunities for Growth*
- *NYK Line / TDG Logistics Division
and the Philippines*



Global Fleet Capacity



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MarineTraffic.com

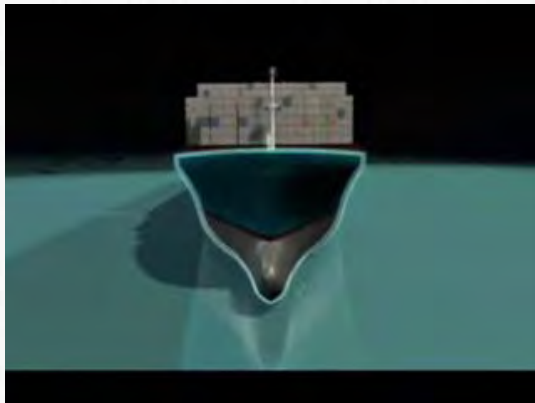
366m



36 Basketball Courts



324m



2014 Contain
18,000 TEU



**NYK Helios
Container Ship
14,000 TEU capacity
introduced 2013**

Global Fleet Capacity



© Mikhail
MarineTraffic.com

MSC OSCAR

Largest as of 08 Jan 2015

19,224-teu ship

**Can not fit the New PANAMA
Canal of 2016**

No US Port can accomodate



**MAN size
relative to SHIP**

Only to be assigned

In the

ASIA – EUROPE Trade

MAERSK

CHINA SHIPPING

UNITED ARAB SHIPPING

almost similar sizes



**NYK Line introduced Feeder Max Vessel
3000-teu in Manila last April 2010**



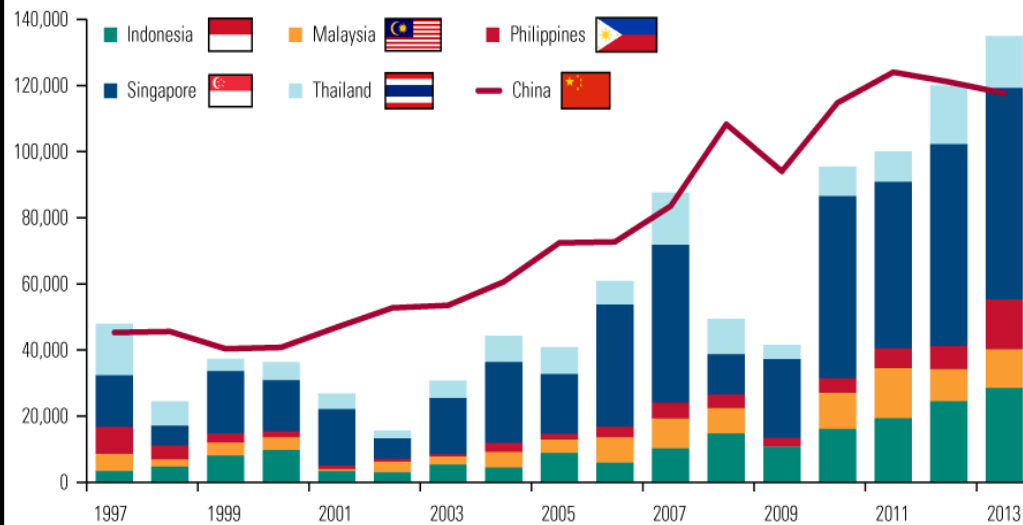


**FACTORY
ASIA**

INTERNATIONAL BUSINESS TIMES

Aggregate Foreign Direct Investment into Major Southeast Asian Countries Has Surpassed China

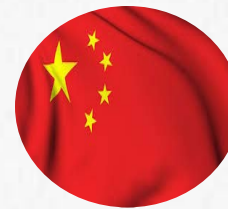
Million U.S. Dollars



Note: China FDI refers to FDI utilized; Indonesia FDI refers to foreign investment realization; Philippines & Thailand FDI refers to FDI approved. Malaysia and Singapore FDI data on BOP basis. 2013 FDI data for Philippines is BofAML estimate.

Source: BofA Merrill Lynch, CEIC, U.S. Global Investors

Southeast Asia Receives More Foreign Direct Investment (FDI) Than China, Which Is Now The World's Third-Largest Foreign Investor



CHINA FDI
\$117.6 Bn



ASEAN FDI
\$137.4 Billion

Sources : International Business Times



Growth Factors in Asia / ASEAN

ASEAN FTA's



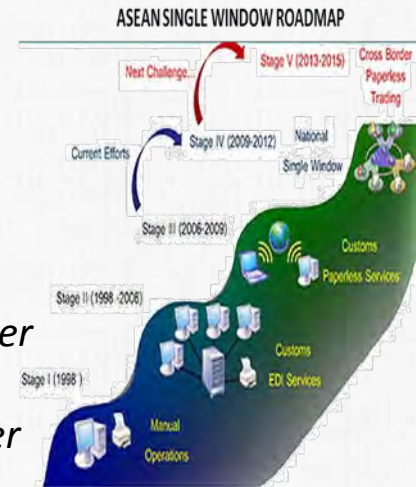
- CHINA-ASEAN FTA (CAFTA)
- INDIA – ASEAN FTA
- ASEAN FTA COMMON EFFECTIVE PREFERENTIAL TARIFF
- AFTA - CEPT
- ASEAN-KOREA FTA (AKFTA)



ASEAN SINGLE WINDOW

Can diverse Asean nations form a community by 2015?

The free movement of goods and services; and an even freer movement of capital and talents among the 10 member states.



INTRA - REGIONAL TRADE

- Consumption – Rising Population
- Stronger economies
- Increased Foreign Investments



	Intra-ASEAN Trade	Intra-ASEAN Export	Intra-ASEAN Import
Philippines	19.1	16.0	21.8
Indonesia	25.6	22.3	29.0
Malaysia	27.4	28.1	26.7
Singapore	26.4	31.4	20.9
Thailand	21.7	25.8	17.8
Vietnam	14.9	13.7	16.2
ASEAN	24.2	26.0	22.4

Source : Asean Secretariat Nov 2014



Growth Factors in Asia / ASEAN

Intra Asia

MET: Meteor Service



Port Rotation

Origin	ETA/ETD
Osaka	FRI/FRI
Yokkaichi	SAT/SAT
Nagoya	SAT/SUN
Shimizu	SAT/SUN
Tokyo	SUN/MON
Yokohama	TUE/TUE
Kobe	WED/THU
Manila	MON/TUE
Ho Chi Minh	FRI/SAT
Singapore	MON/TUE
Manila	SAT/SUN
Osaka	FRI/FRI

Turnaround days

28

Weekly/Fixed Day Service

NYK LINE services in ASIA are geared to connect the PHILIPPINES, The ASEAN countries and JAPAN / KOREA / CHINA

Philippine Competitiveness



GDP 2014F: 6.4%

GDP 2015F: 6.7%

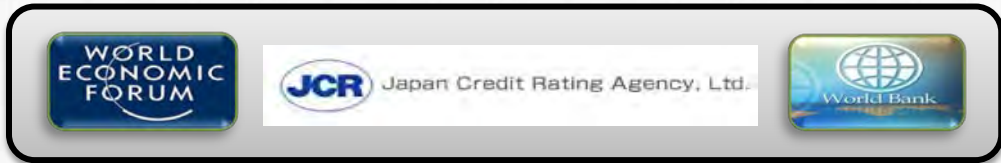


Population : 100.6M

Continued confidence in the Philippines



2015 ASEAN Growth Leader



STANDARD & POOR'S	Moody's	Fitch Ratings	TRADING ECONOMICS
PHILIPPINES	S&P Rating BBB	Moody's rating Baa3	Fitch Rating BBB-
	STABLE	POSITIVE	STABLE
			TE Rating 45.63
			POSITIVE



NYK and its ICD Operations in Manila/Laguna

ACT NCT Transnational Corporation



NYK FIJ JAPAN

28 March 2014

To : **OUR VALUED CUSTOMERS**

Subject : **Container Yard Operations Schedule (April 2014)**

Greetings from NYK!

We would like to inform you of our new Container Yard (NCT) Schedule effective April 1, 2014.

Monday – Friday: 9AM – 6PM
 8PM – 6AM

Saturday: 9AM – 6PM
 8PM – 12Midnight

Also, our CY will still be open during Sunday from 1AM until 5PM in order for you to return and pull out empty containers during weekends.

- ✓ Modern System and Equipment
- ✓ Adjusted Operational Hours
- ✓ Optimal flow of trucks

**Most modern
Container Depot
Operations in Manila**





Alternative Gateways – Batangas and Subic



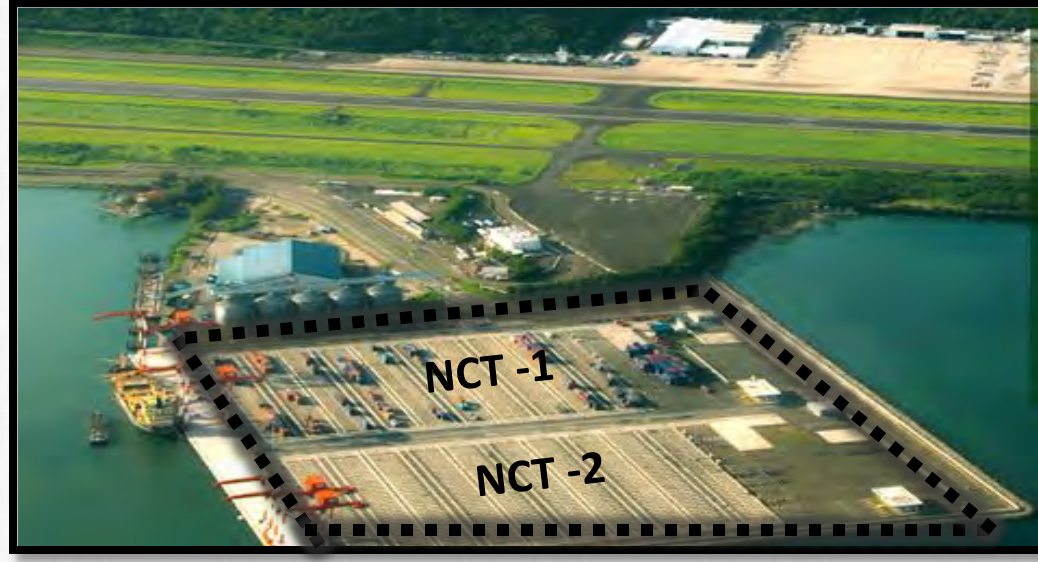


Subic Port Developments



"We'd like to get the shipping lines to call and get the key shippers to ship from Subic."

SBMA Chairman Roberto V. Garcia





Subic as Alternative Gateway

First DIRECT service ex-JAPAN
to SUBIC / Taiwan to Subic

First DIRECT service ex-SUBIC to
SINGAPORE

First DIRECT service ex-SUBIC to
VIETNAM



23 NOVEMBER 2014 MAIDEN CALL

NYK goes to SUBIC

23 November 2014 / MV JAKARTA TOWER voy -002S

OPTIONS THROUGH A NEW GATEWAY

SUBIC



For more details:
Please call your local NYK Sales Team
at 527-9888

Osaka > Yokkaichi > Nagoya > Shimizu >
Tokyo > Yokohama > Kobe > Kaohsiung >
SUBIC > MANILA > Ho Chi Minh >
Singapore



Efficient shipping today. Innovative solutions tomorrow.



Regular calls in December 2014
– January 2015



Subic – Manila as MAIN Gateway

NYK Service goes “SUBIC > MANILA”

NYK METEOR SERVICE



5 x 3000-teu vessels

Osaka > Yokkaichi > Nagoya > Shimizu > Tokyo > Yokohama > Kobe > Kaohsiung >
SUBIC > MANILA > Ho Chi Minh > Singapore > **SUBIC > MANILA** > Osaka



SUBIC connected DIRECTLY
 Japan, USA, Europe, ASEAN,
 Oceania with **WEEKLY CALLS**

More ALTERNATIVES for both
EXPORTS and IMPORTS
 via **SUBIC** or via **MANILA**

METEOR NB :
 Subic (Sundays)
 Manila (Mondays)

Guarantee of NO DELAY to
IMPORT PHILIPPINE ARRIVAL

Service is Expansion Ready
 for more **PANAMAX Vessels**

METEOR SB :
 Subic (Mondays)
 Manila (Tuesdays)



An ICTSI Group Company

21 Hectare Inland Container Terminal

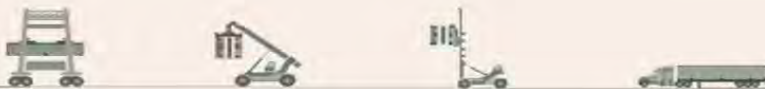
250,000 TEU Annual Capacity Facility

58 Km South of Manila, Intermodal access via Truck and rail

24/7 System Based Operations and State of the Art Facility

1 Stop Logistics Shop for Reefer and Dry Containers

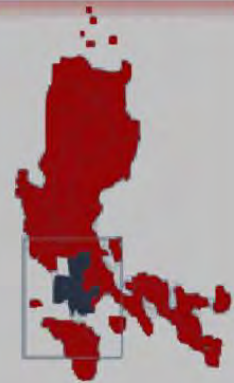
Efficient Empty Container Depot
BOC bonded & PEZA Accredited



An ICTSI Group Company



LOCATION



LGICT Compound, Old National Highway, San Cristobal, Calamba City 4027, Laguna, Philippines





An ICTSI Group Company





Rationale for an Inland Container Depot (ICD)

Contributes to the maintenance of reduced dwell time of MICT imports

Provides “One Window Logistics Solution” to MICT prime customers

Expand EFFICIENT container depot operations in key markets south of Manila

Proactive approach to an enhanced logistics package to benefit customers
beyond shipping

Globally recognized best practice in inland support to marine terminals in highly
developed economies. It is something missing in Philippine logistics





- Extension of seaport operations; staging area for import and export transactions
- Indirectly increasing capacity of MICT by 10%
- Accelerate trade movement



- Empty container storage
- Repair and maintenance
- Reduce container truck traffic in Metro Manila



Uniqueness of the Market



**BUSINESS
EFFICIENCY**



CHANGE IN SUPPLY CHAIN ACROSS VARIOUS COMMODITIES





NYK Group in the Philippines

Role of International Shipping





NYK GROUP IN THE PHILIPPINES



NYK vessels call the Manila North Port (MICT) and South Port.



NYK Roro vessels call at Batangas. NYK also set up PDI facilities in Laguna and Batangas.



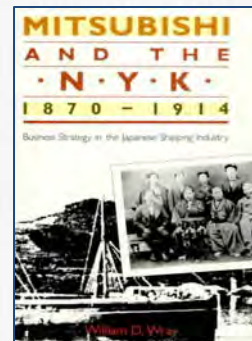


NYK GROUP IN THE PHILIPPINES

TRANSNATIONAL DIVERSIFIED GROUP
Philippine conglomerate of
over 17,000 employees



NYK LINE
Forerunner of the
Mitsubishi
Group since 1885



**Business
Process
Outsourcing**

Logistics

Shipping

Ship Management

Academy



NYK Auto Logistics Phils.





 **NYK Auto Logistics (Philippines) Inc.**



TDG LOGISTICS DIVISION





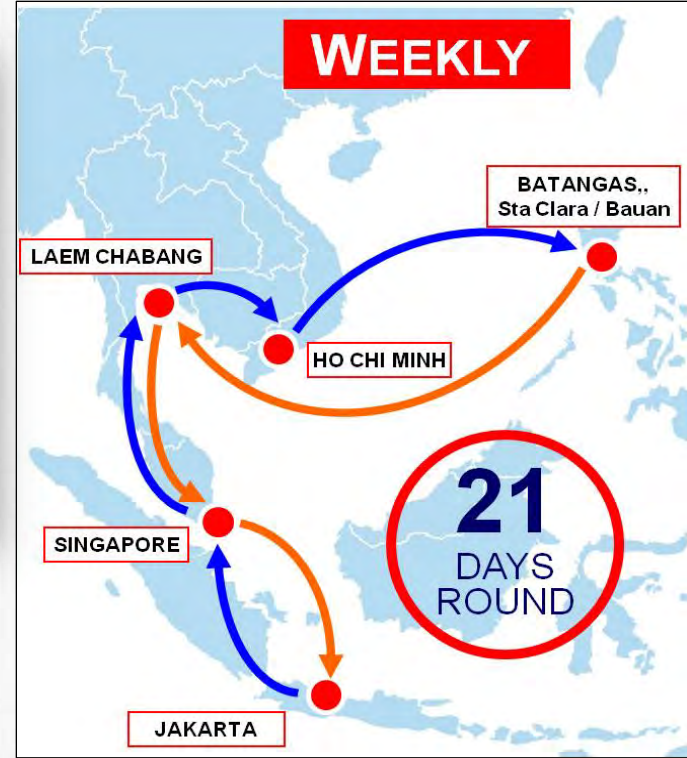
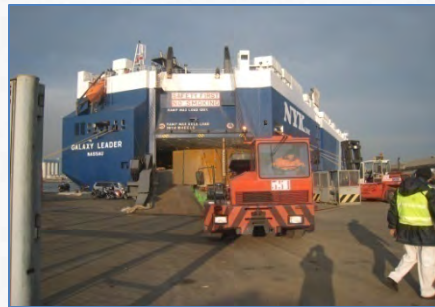
NYK ENHANCES RORO SHIPPING IN PHILS



Sta. Clara



NYK CREATED AUTOHUB IN BATANGAS



NYK Line introduces :
TUG MASTER and
MAFI





NYK EXTENDS LOGISTICS BEYOND SHIPPING

We have to build facilities which complements SHIPPING.

NYK Auto Logistics (Philippines) Inc.



We have to INTEGRATE PROCESSES for Domestic Transport.





NCT Transnational Corporation





NYK INNOVATES NICKEL ORE TRANSPORT

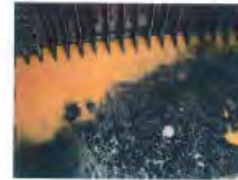


**M/V ATLANTIC ELM
NAMING AND DELIVERY CEREMONY
06 JUNE 2012
TSUNEISHI HEAVY INDUSTRIES (CEBU) INC**

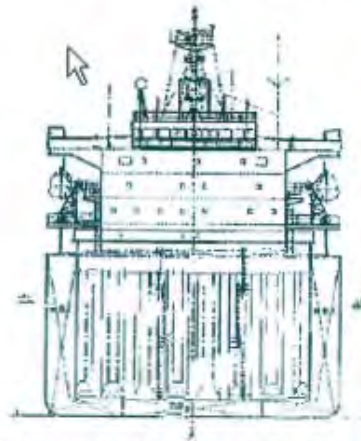


Nickel Ore Transportation

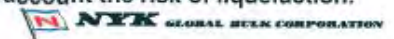
- Nickel Ore contains high percentage of moisture and caused several accident in the past by liquefaction
- NYK has more than 35 years experience of nickel Ore Transportation without any serious accident.



Transportation by Handymax



NGB is using Semi-Box shaped vessel to carry Nickel Ore to provide service safely
Cargo loaded in box shape hold can be trimmed as flat as possible by grabs
in order to maintain safe stability taking into account the risk of liquefaction.





NYK EXPANDS BPO FOR GLOBAL NEEDS

BUSINESS PROCESS OUTSOURCING



- Joint venture with **NYK Line (Japan)**
- Provides back-office functions for NYK Line across 22 countries:
 - Export documentation
 - Container movement monitoring
 - Global help desk
 - Booking input
 - Manifest dispatching
 - Regional code administration
- Average of 55,000 BLs/month
- 99.8% accuracy level
- 1st Non-Voice BPO to secure Philippine Quality Award





NYK GROUP STRENGTHS



私がクルマを見る目は、世界中の誰よりも、ずっと厳しい。

NYK TRANSNATIONAL VEHICLE LOGISTICS CENTER, Batangas, Philippines.

マニラの街。

お決まりの決まりきった流れではなく、異業種との間、バタングスの東に
NYK TRANSNATIONAL VEHICLE LOGISTICS CENTERがある。

PDVの機能も備えたこの施設では、

自動車の品質検査や部品在庫の取り付けが行われる。

輸送だけでなく自動車輸送の仕事ではない。物流は本業の一端になっている。

「私もメーカーのパートナーとして自動車をやっているのです。」

BuickのInspector、レイモネステリアはそう語る。

「この仕上げの工程で、製品の最終チェックを済ませていくのが私の仕事です。」

今やPDVは自動車部品に欠かせない製造工程の呼び名です。

求められるのはカスタマイズ対応であり、業のあり方です。

「世界した車を初めて見かけると、自分の手元に再会したみたいですね。」

Feeling Good、という言葉を掲げて誓うその姿は、

言葉にそうあって実際にこぼした。

地球規模で業務をこなすべく、すべての現場で確実に業務に貢献していく。

その積み重ねのことで、私たちの使命と目標はあります。

今日は世界の東で、夜で、空で、ものが動くその現場に、日本郵船はいます。

地球現場へ。

NYK LOGISTICS
A MEGACARRIER
NYKグループの一員

日本郵船株式会社 東京支社物流部 3-2 TEL:03-5284-5151 FAX: E-mail: press@nyklogistics.com <http://www.nyklogistics.jp>

日本郵船



NYK GROUP STRENGTHS

私がクルマを見る目は、世界中の誰よりも、ずっと厳しい。

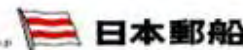
NYK TRANSNATIONAL VEHICLE LOGISTICS CENTER, Batangas, Philippines.



マニラの街。
 およそりの浜邊さえなければ車で2時間ほどの都、パナゴスの港に
 NYK TRANSNATIONAL VEHICLE LOGISTICS CENTERはある。
 POIの機能も備えたこの施設では、
 自動車部品や車検申請書類の取り付けが行われる。
 輸送だけが日本郵船の仕事ではない、物流は高度の専門になっている。
 「私たちもメーカーのパートナーとして自動車も存心しているのです。」
 Bayoff Inspector レイ・モナスリアはそう語る。
 「この仕上げの工程で、製品の価値をさらに高めている社員が私にはあります。」
 今POIは自動車物流に欠かせない、最先端の設備も揃った大規模な、
 求められるのがカスタマイズに対応であり、莫の多いサービスである。
 「得意した車種でも見かけると、自分の手洗に再会したみたいですね。」
 Facing Color「新しい顔差しを付けて車ぞりを保ち、
 君様にそう笑って笑顔もこぼした。」
 地球規模で高セキュリティを求め、すべての商標で確実な、柔軟に対応のしついで。
 その積み重ねがこそ、私たちの使命と誇りがあります。
 今日は世界の海で、陸で、空で、ものが動くその現場に、日本郵船はいます。
 地球現場へ。



日本郵船株式会社 東京都中央区本町2-2-1 TEL:03-3264-5151 FAX: 1 e-mail: nyk@nyklogistics.com http://www.nyklogistics.jp





NYK COMMITMENT TO THE PHILIPPINES

NYK TDG MARITIME ACADEMY





NYK COMMITMENT TO THE PHILIPPINES

NYK TDG MARITIME ACADEMY



206.5 kWp Solar Carpark & Test Bed
Canlubang, Laguna, Philippines





NYK COMMITMENT TO THE FUTURE

The Ships of the FUTURE



Lloyds List Ship of the Year 2009



The Auriga Leader has 328 solar panels.

NYK SHIPS OF TODAY are very eco friendly



YAMATAI 2010 Innovative Ship



Bubbles generated by supplying air to the vessel's bottom



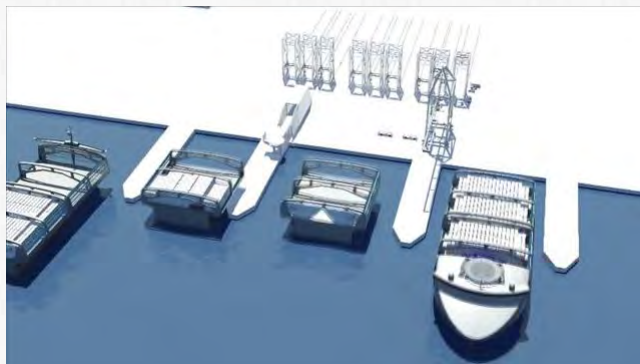
NYK COMMITMENT TO THE FUTURE

The Ships of the FUTURE



	Conventional Vessel	NYK Super Eco Ship 2030
Length Overall	338 meters	353 meters
Breadth	45.8 meters	54.6 meters
Draft	13.0 meters	11.5 meters
Main power (Fuel)	Diesel Engine (C heavy oil) 64 megawatts	Fuel Cell (LNG) 40 megawatts
Natural power	None	Solar: 1-2 megawatts Wind: 1-3 megawatts
CO ₂ emissions*	195 g/TEU-miles	62 g/TEU-miles

*TEU-mile: Unit for the carriage of one TEU a distance of one mile



Thank You !
Mabuhay !