



# BIMP-EAGA Opportunities

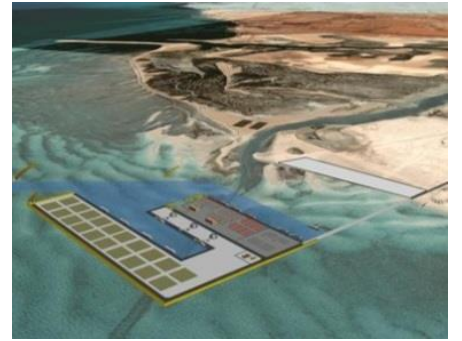
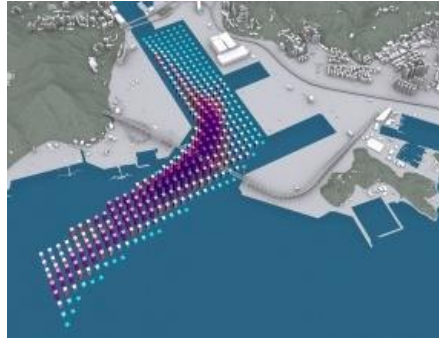
## Philippine Ports & Shipping 2022

Sofitel Philippine Plaza Manila

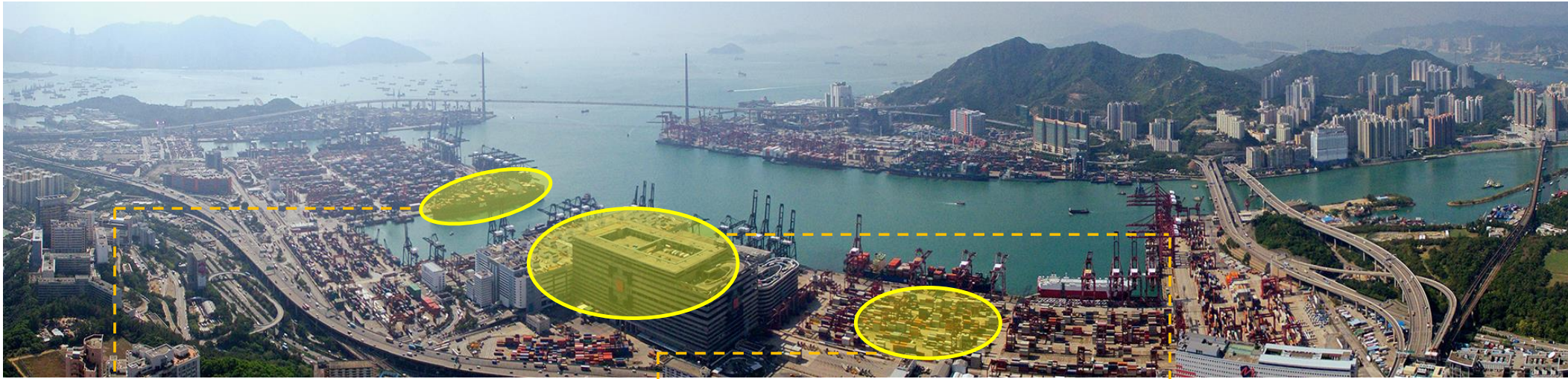
21-23 June 2022



# BMT Global Maritime Consultancy Services ([www.bmt.org](http://www.bmt.org))



# BMT in Ocean Shipping, Ports and Logistics



## Shipping Industry

- Container & GC
- Dry Bulk
- RoRo & Passenger
- Tankers



## Ports & Terminals

- Container Ports
- Bulk Terminals
- Multipurpose
- Oil & LNG Jetties



## Econ & Hinterland

- Industrial Parks
- Logistics Parks
- Free Zone (SEZ)
- Inland Terminals

- Market Study
- Feasibility Study
- Port Master Plan
- Business & Commercial

- Strategic Planning
- Economic Study
- Maritime Engineering
- Financial Assessment

- Asset Valuation
- Transaction Advisory
- Due Diligence
- Operations Assessment

- Benchmark & Comp'tivness
- Regulatory & Institutional
- Investment / PPP
- Tenders & Concessions

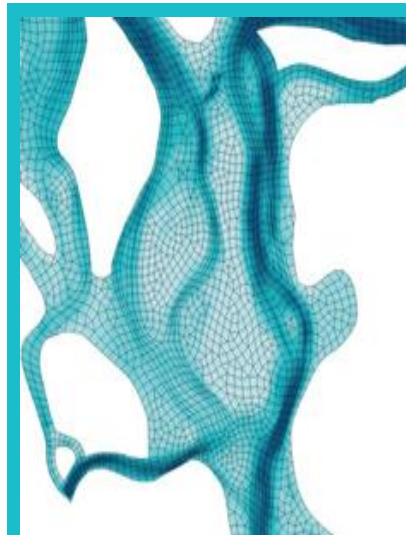
# BMT in Smart Ports and Shipping



**BMT Deep - Integrated Data Management**



**Port Operations and Simulation Model**



**TUFLOW FV Hydrodynamic Model**



**MetOcean Services and Solutions**

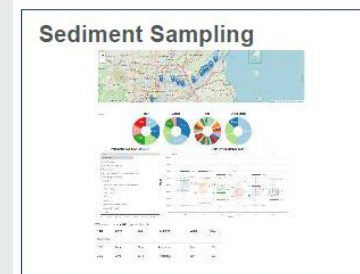
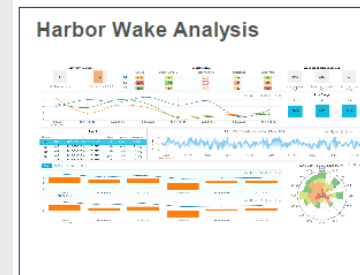
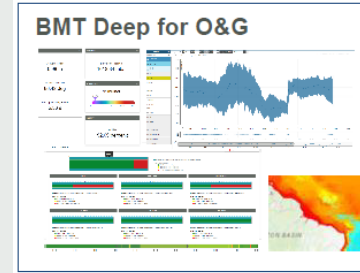


**BMT REMBRANDT Ship Simulator**

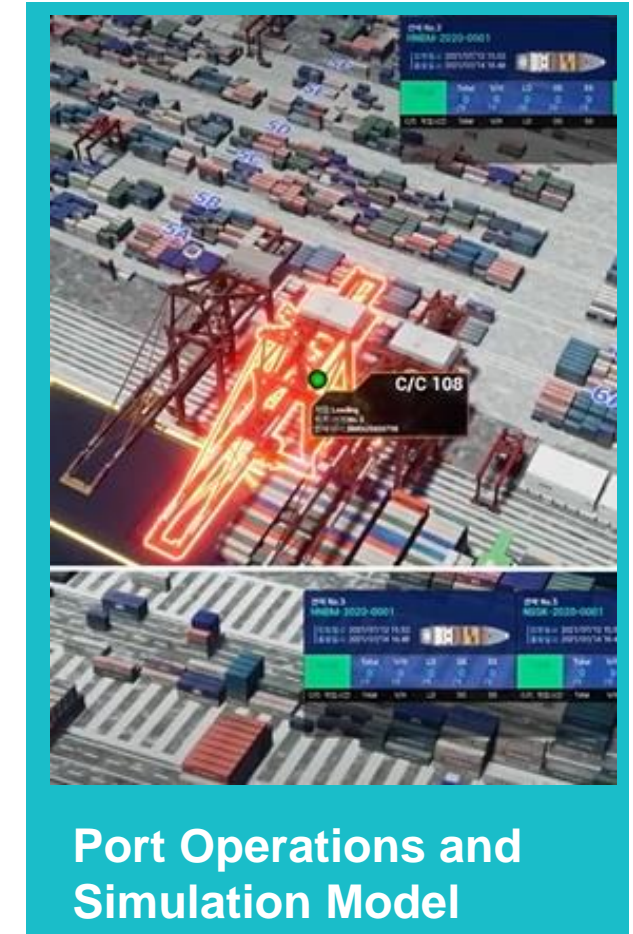
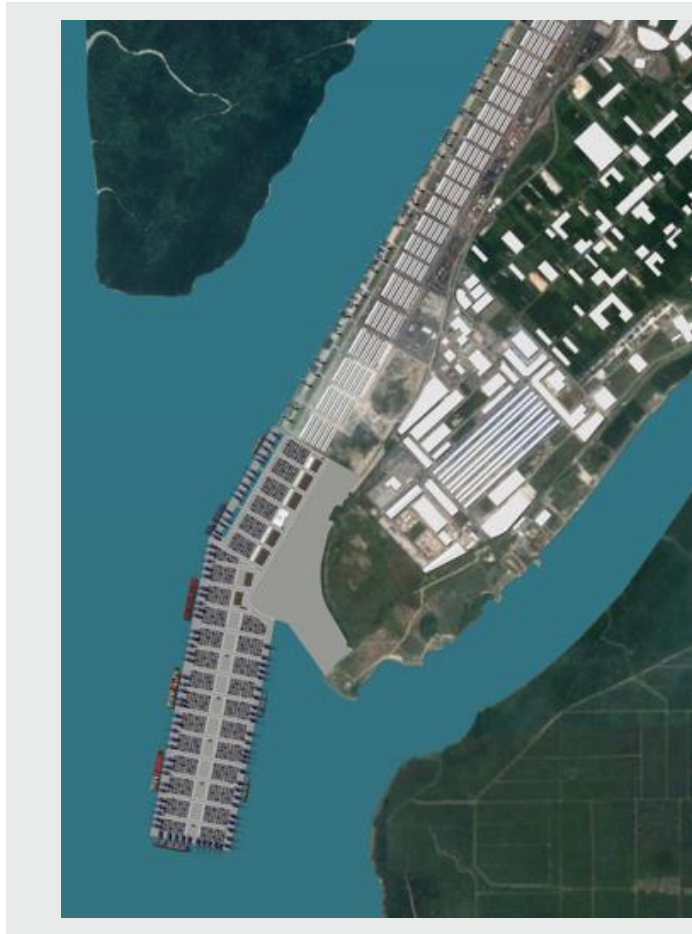
# BMT in Smart Ports and Shipping

**Welcome to BMT Deep**  
the interactive asset data portal created by marine and offshore professionals for marine and offshore professionals

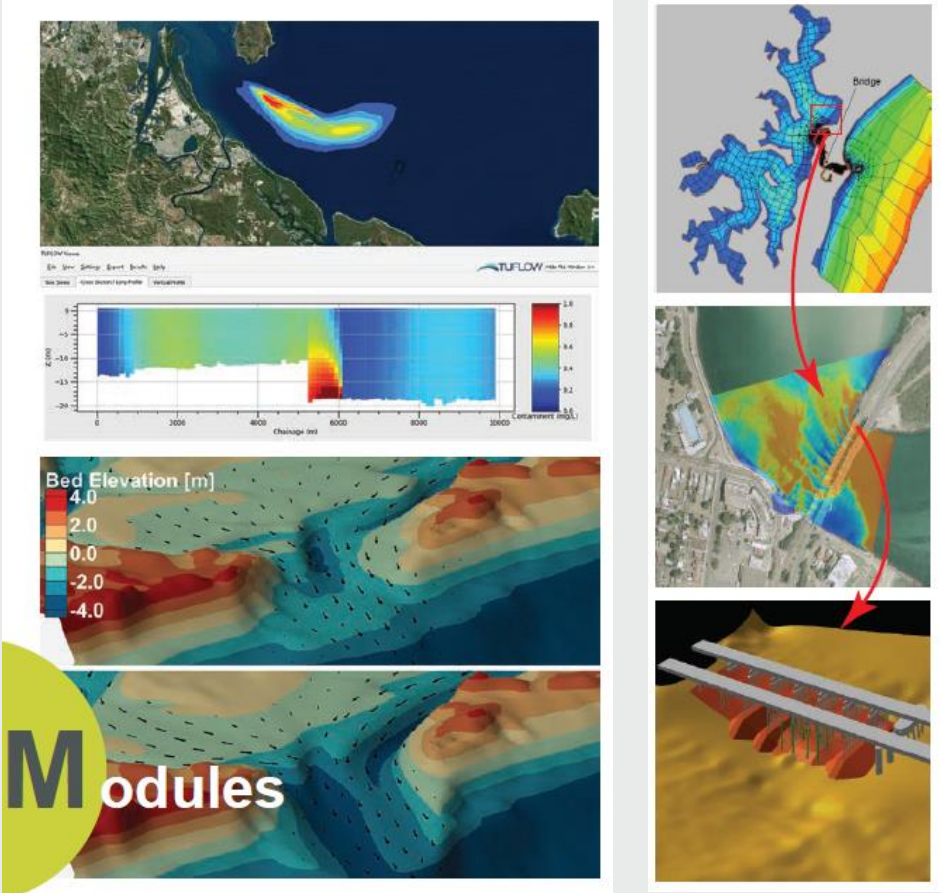
- 400+ users
- 50+ assets
- 2,300+ devices
- 41,000+ channels
- 100 TB processed data
- 1 trillion daily processed datapoints



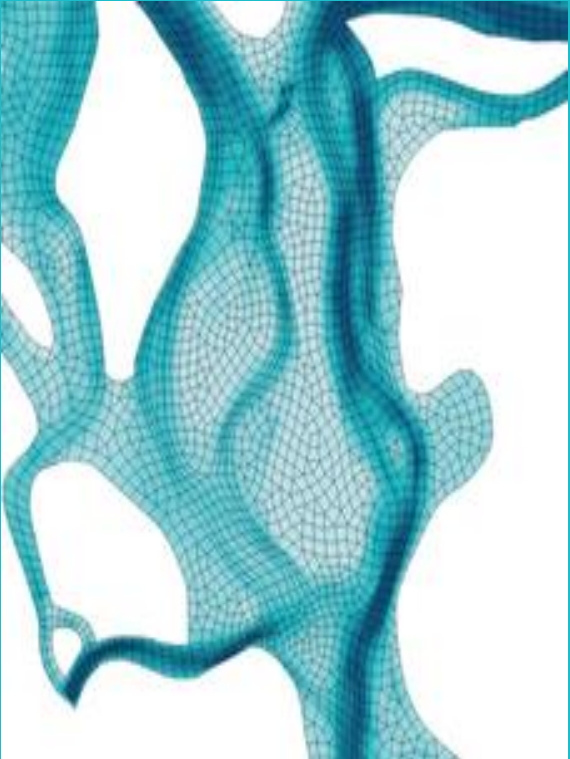
# BMT in Smart Ports and Shipping



# BMT in Smart Ports and Shipping



- 700 company users worldwide
- World leading 2D and 3D computer simulation software
- Coastal hydraulics, metocean modelling, sediment transport, flooding, urban drainage, and water quality assessments.



**TUFLOW FV  
Hydrodynamic Model**

# BMT in Smart Ports and Shipping



## Full bridge simulator

Our full-bridge mission simulator is an immersive system ideal for ship officer and marine pilotage training. The bridge simulator can be configured with conventional, azipod and custom-built control consoles to provide a real-life immersive simulation experience.

Many national statutory agencies rely on BMT REMBRANDT.

- The Australian Transport Safety Bureau
- The Dutch Safety Board
- The UK's Marine Accident Investigation Branch
- National Transportation Safety Board (NTSB)



**BMT REMBRANDT**  
**Ship simulator**



# The history of BMT

## The Beginning

**1887**

Charles Parsons, inventor of the steam turbine establishes the company that becomes the cornerstone of the British Ship Research Association, which in turn evolves into one half of BMT

**1925**

BMT's first operating company is acquired in the surveys market

**1976**

National Maritime Institute (NMI) set up

**1998**

The formation of the Employee Benefit Trust

**1909**

National Towing Tank opened, forerunner to the National Maritime Institute (NMI)

**1944**

PAMETRADA and BSRA are established

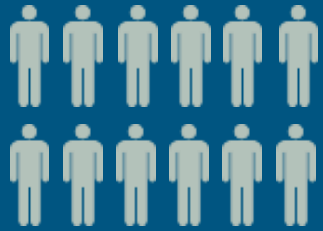
**1985**

British Maritime Technology created from merger of NMI & BSRA - 1 company, 480 staff

**Next**

# BMT at a glance

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1,500+ people

Established  
**1985**

**47**  
offices



**16**  
Countries

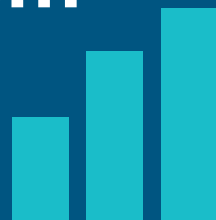
**Innovation**

— FINANCIAL REVIEW BOSS —  
**MOST INNOVATIVE  
COMPANIES**

**2020**

Turnover 2019:

**£176m**



**Independent**  
an Employee  
Benefit Trust

**Developers of**  
**TUFLOW**  
hydraulic modelling software

# A network of knowledge and resources close to our customers

## Commercial Shipping



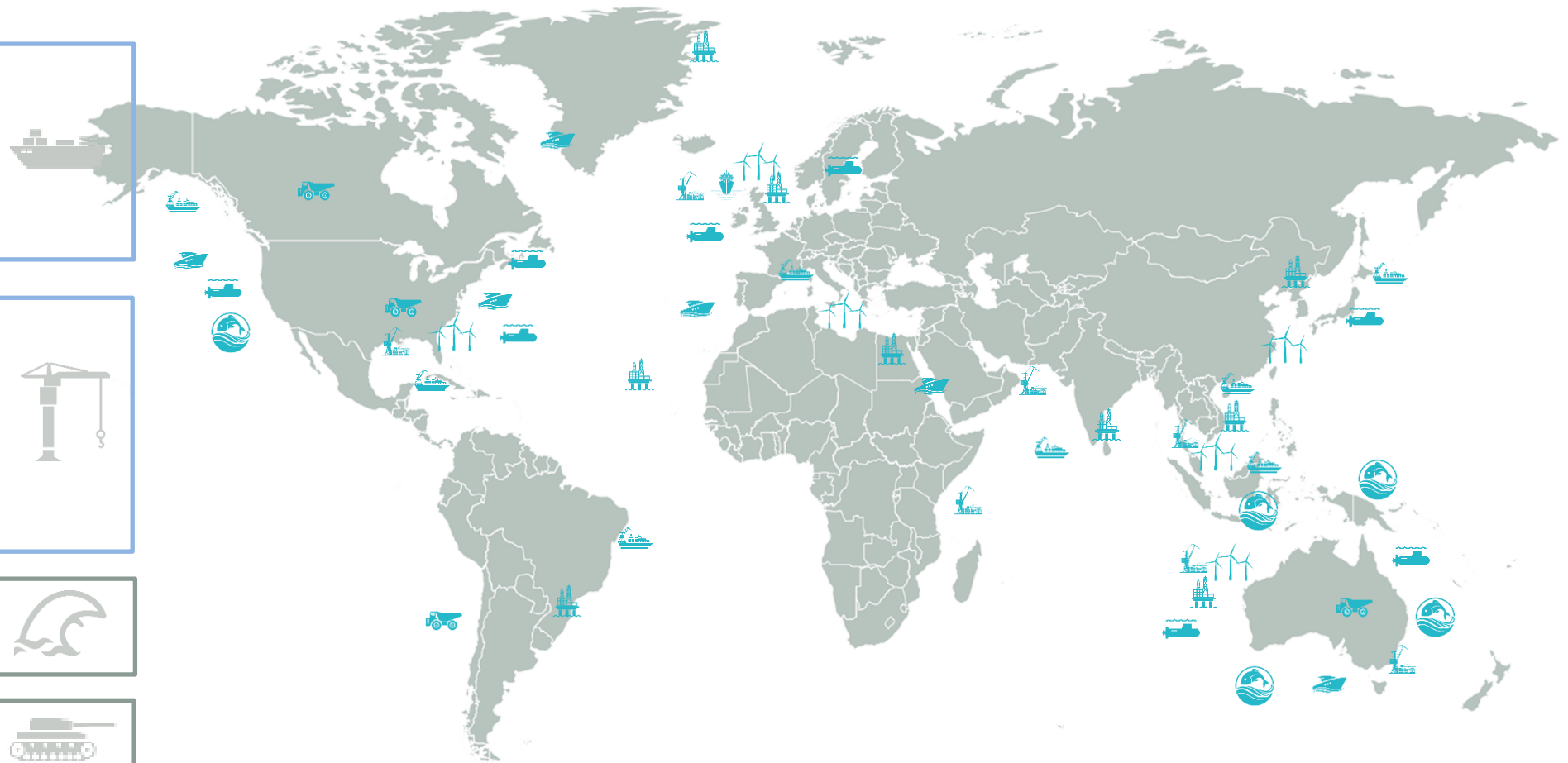
Specialized Ship Design



Vessel Performance



Marine Surveys



## Critical Infrastructure



Ports and Terminals



Shipping and Logistics



Mining and Machinery



Energy



Water and Environment



Defense and Security



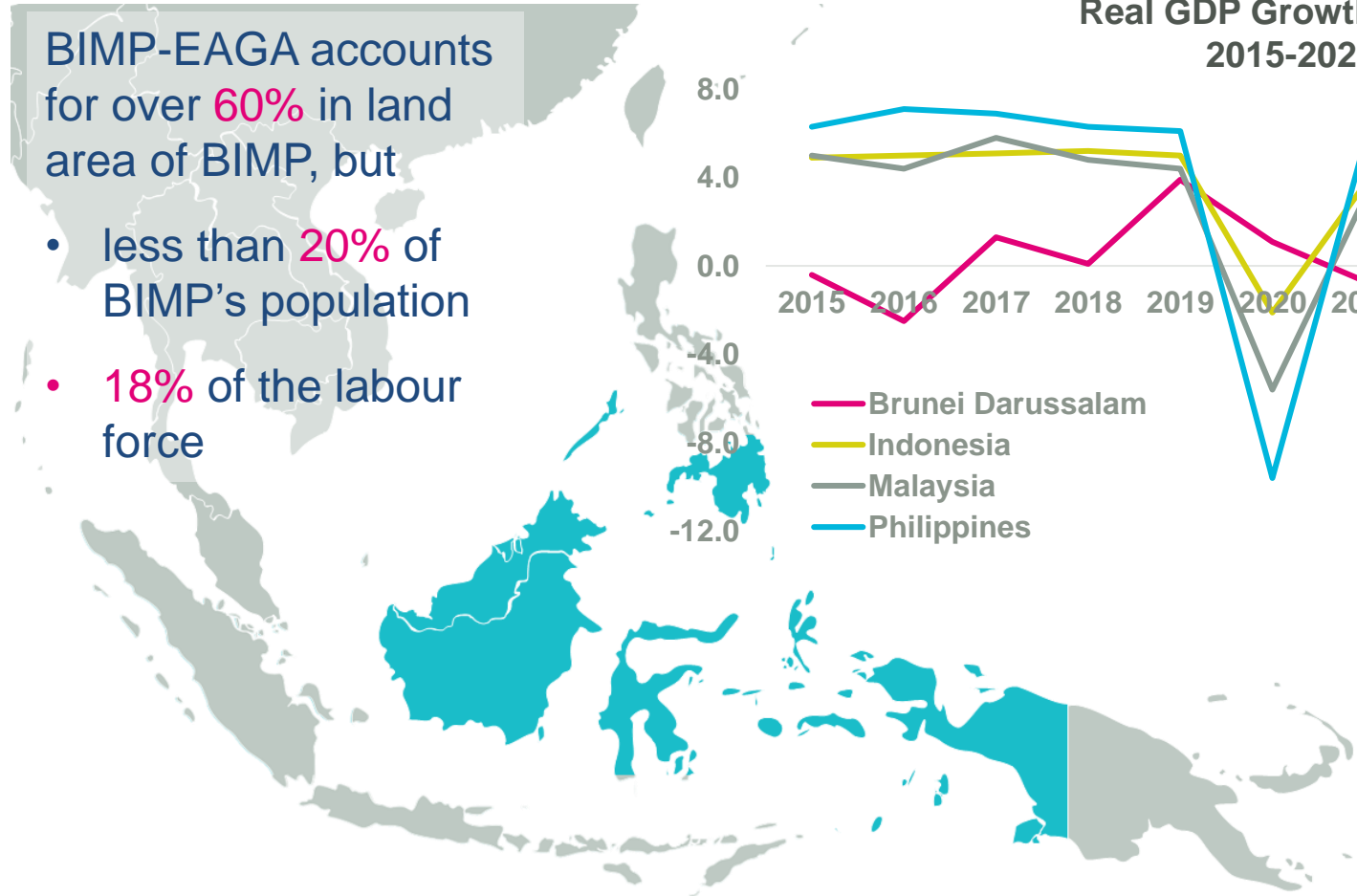


# BIMP-EAGA

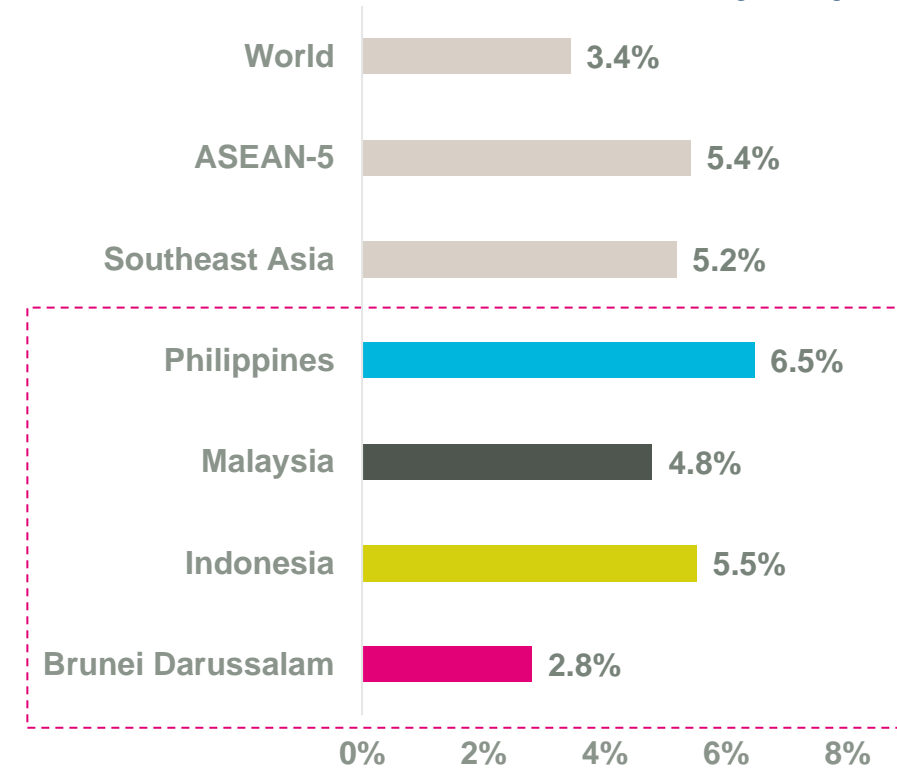
# BIMP-EAGA Economic Development

BIMP-EAGA accounts for over **60%** in land area of BIMP, but

- less than **20%** of BIMP's population
- **18%** of the labour force



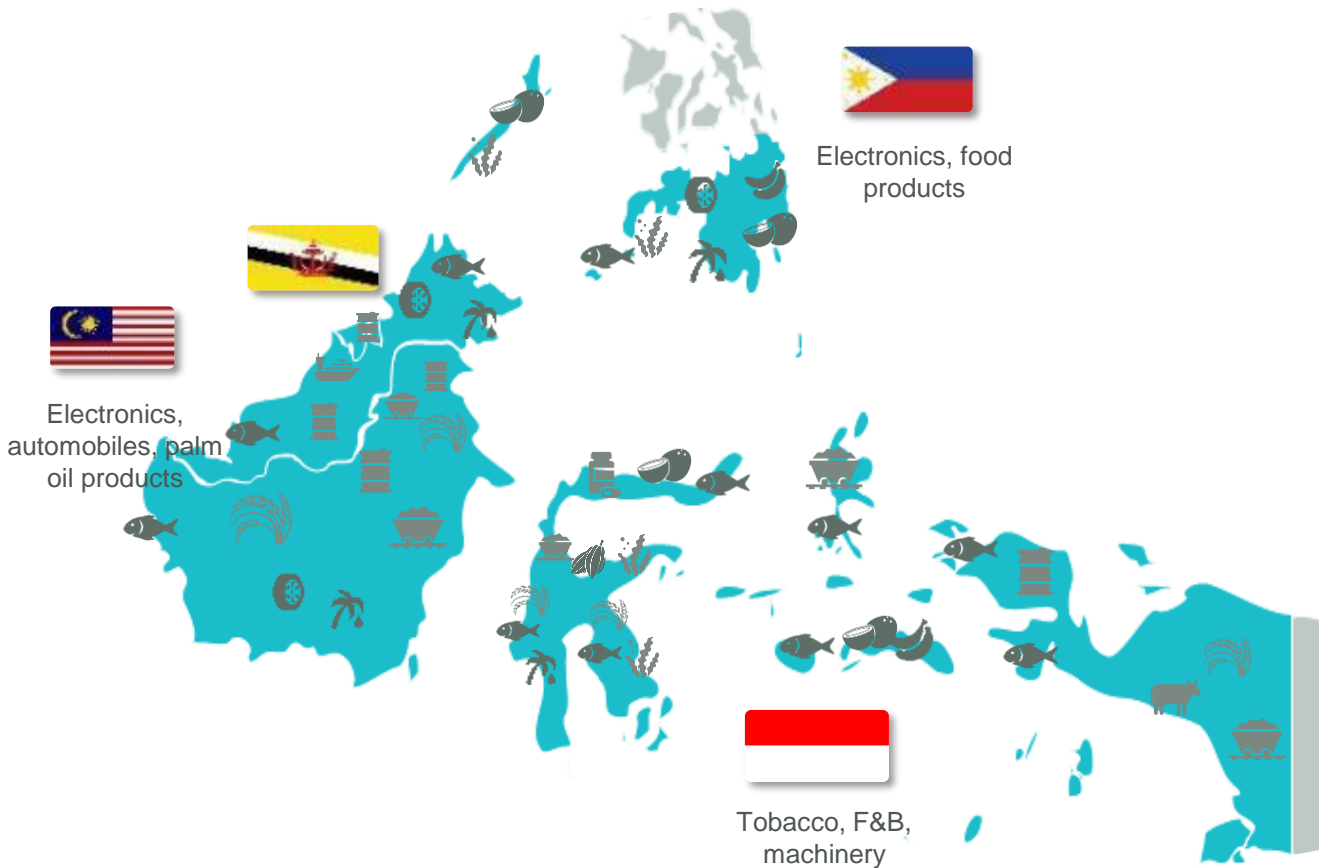
## BIMP Average GDP Growth Forecast 2022-2027



Source: IMF 2022

Trades	Pre-pandemic	2020	2021	1Q 2022
Transpacific	4-6%	6.4%	21%	3.3%
FE-EU	2-5%	-4.8%	11%	-1.0%
Intra-Asia	3-4%	-0.5%	9.0%	2.4%

# BIMP-EAGA Economic Sectors



## Transport

### Growth Drivers:

- Increasing population and incomes
- Transport facilitation
- Improving transport services
- Development potential of BIMP-EAGA areas

### Challenges:

- Transport connectivity
- Varying levels of development; differences in priorities and standards
- Lack of effective promotion of BIMP-EAGA in trade, tourism and investment



## Agribusiness

### Growth Drivers:

- Increasing population and incomes
- Poverty and hunger
- Technology for improved productivity
- New markets for food and agriculture products
- Intra-ASEAN trade to increase

### Challenges:

- Resource depletion
- Changing land use patterns
- Climate change
- Transport connectivity
- Unsustainable farming and fishing practices



## Trade & Investment

### Growth Drivers:

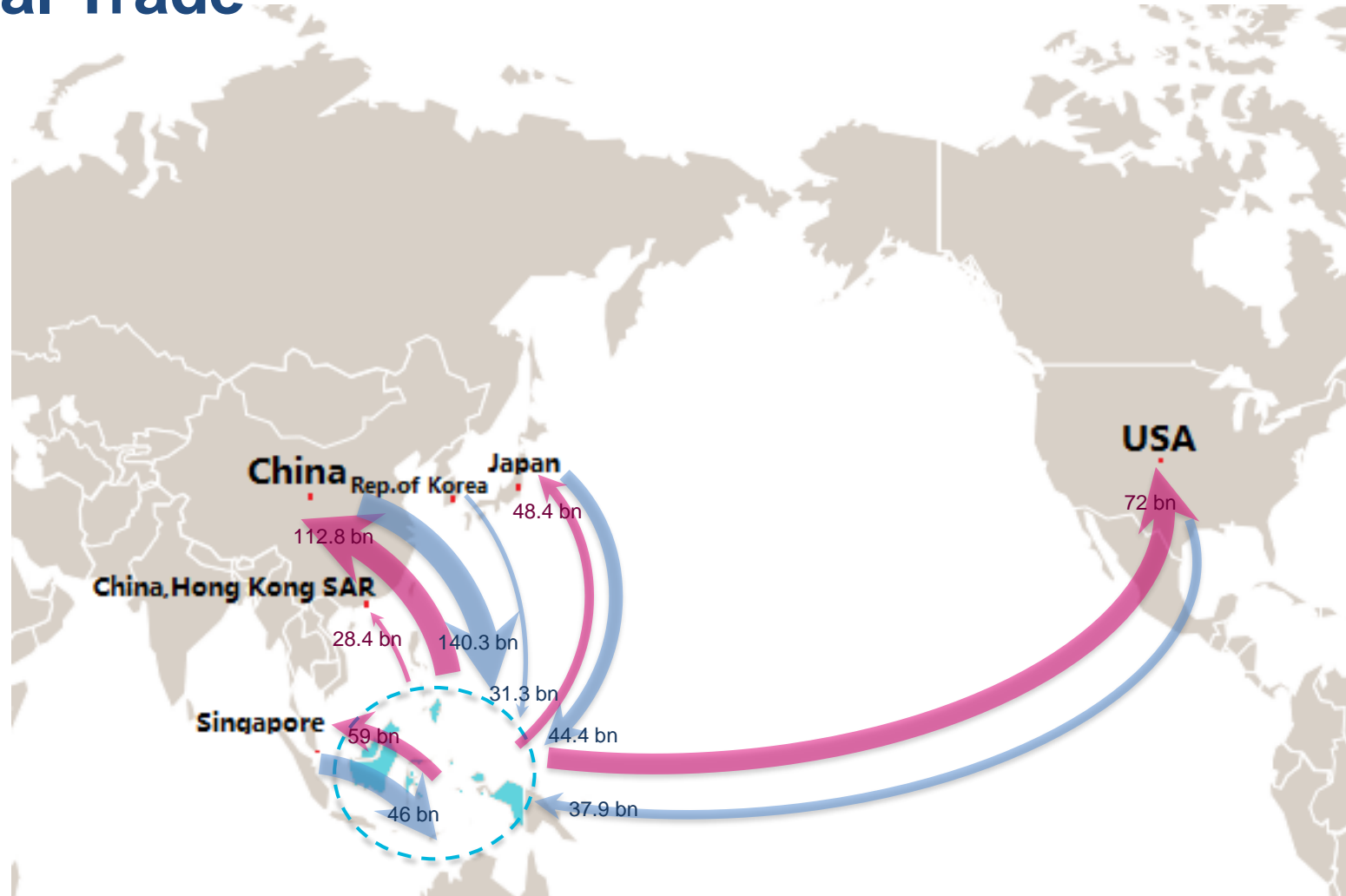
- Increasing household incomes
- SMEs as economic drivers
- Global trends- ASEAN and WTO
- Use of technology in business and industries
- Investment opportunities

### Challenges:

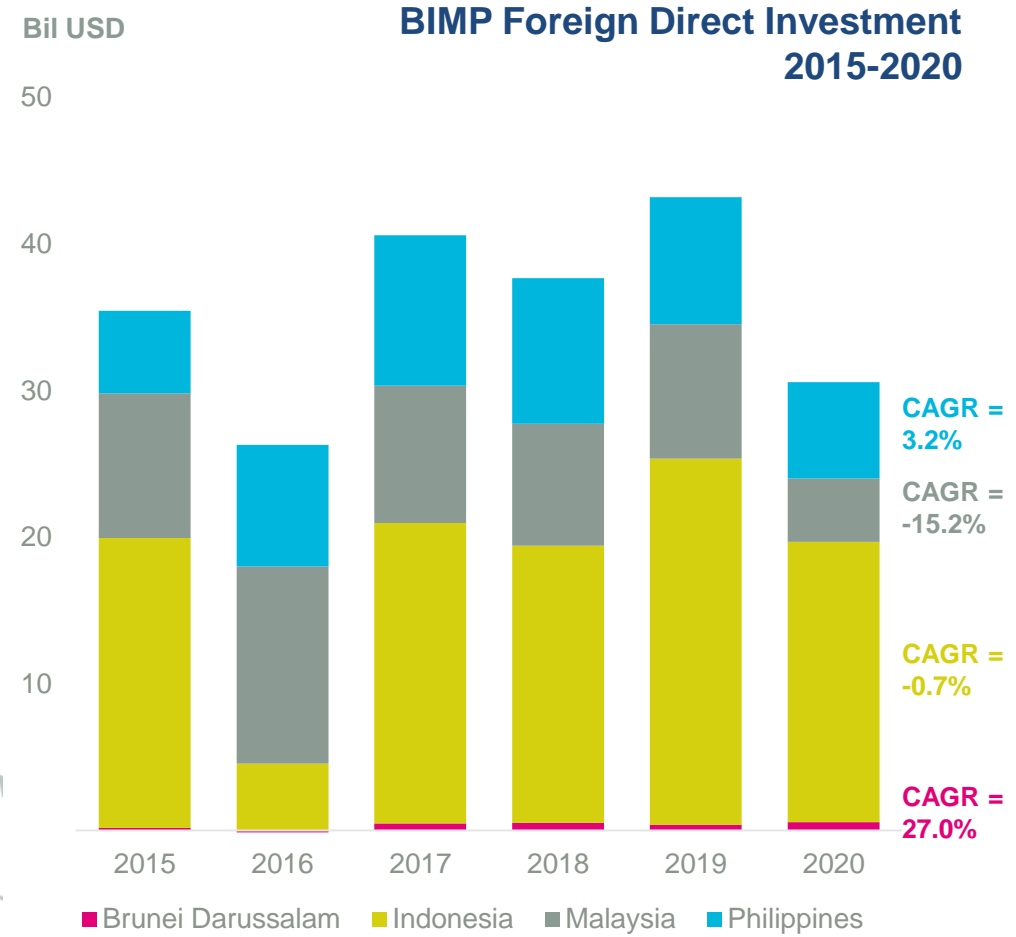
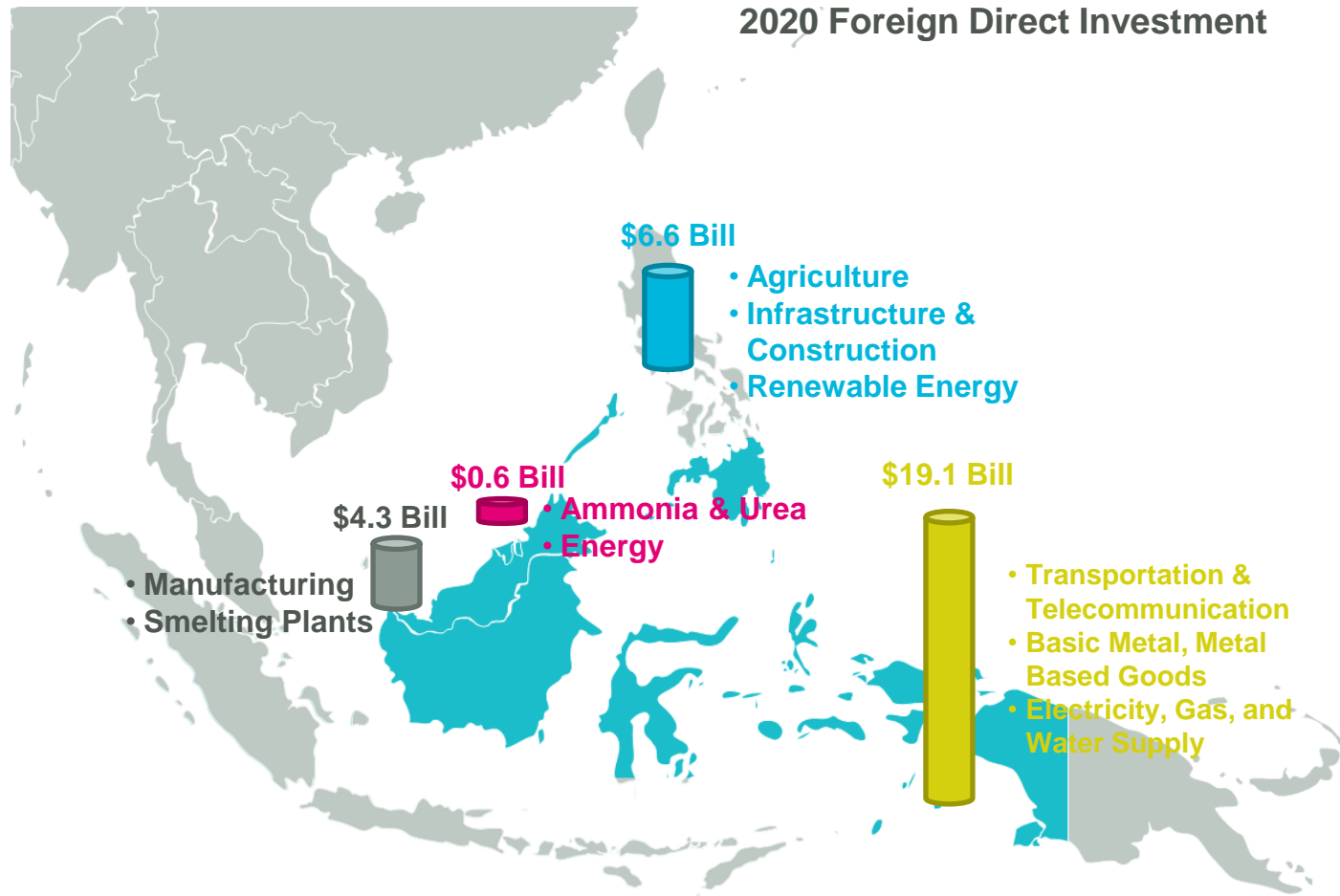
- Lack of infrastructure, poor transport connectivity and logistics services
- Weak information exchange (on business)
- Lack of transparency and cumbersome CIQS RRP

# BIMP-EAGA International Trade

- South Philippines:
  - Coconut Oil, Banana, Mineral Products
  - To: China, USA, Japan, Malaysia
- Brunei:
  - Petroleum Gas, Refined Petroleum, Crude Petroleum, Cyclic Hydrocarbons, Coal Tar Oil
  - To: Japan, China, Singapore, Australia, and Malaysia
- East Indonesia:
  - Coal, Mineral, Ore, Palm Oil, Fuel oil
  - To: Japan, China, USA, Republic of Korea, Philippines
- East Malaysia:
  - LNG, Palm Oil, Crude Petro, Palm Kernel Oil
  - To: Japan, China, Republic of Korea, Australia, Philippines

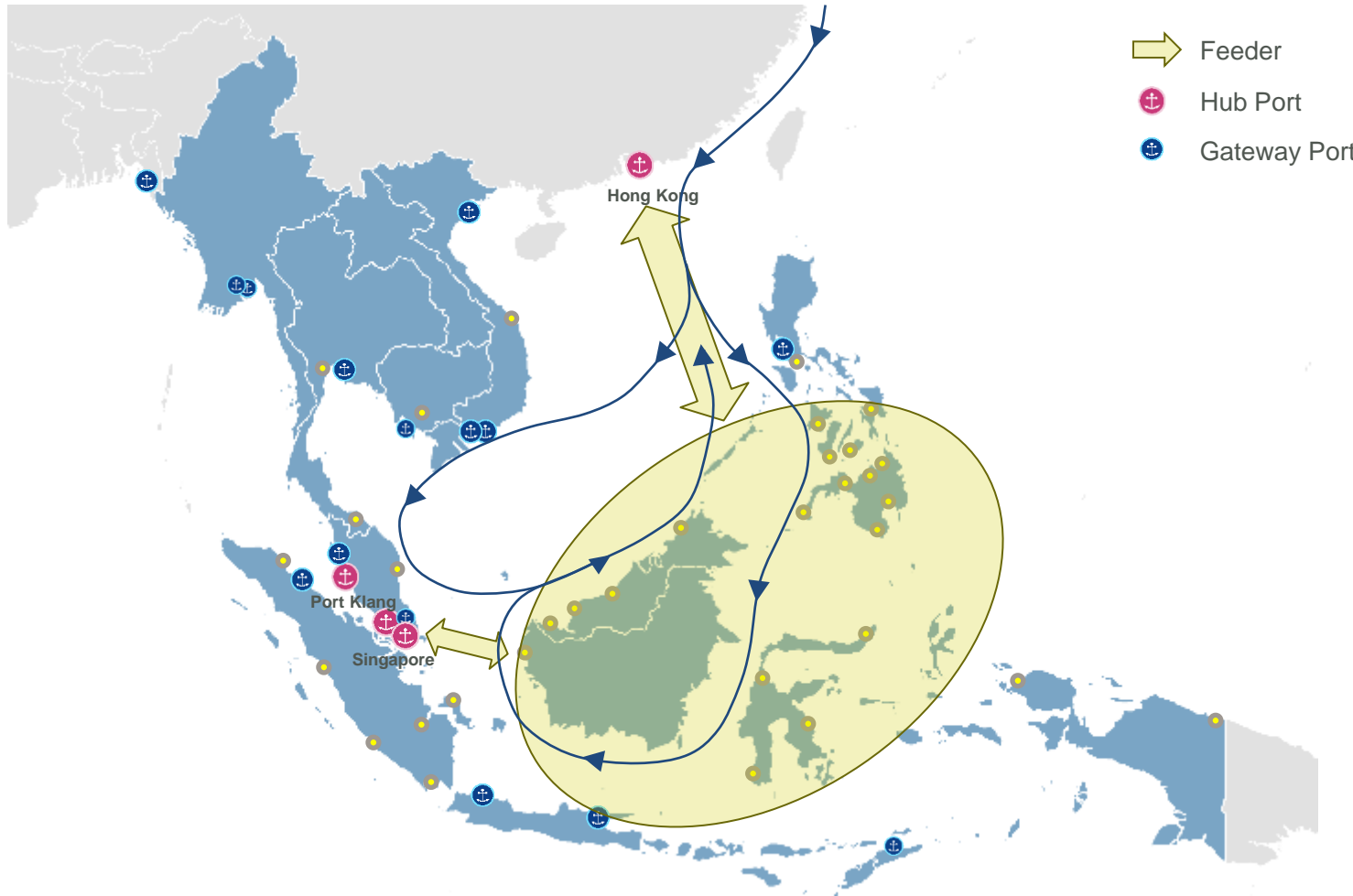


# BIMP-EAGA Foreign Investment



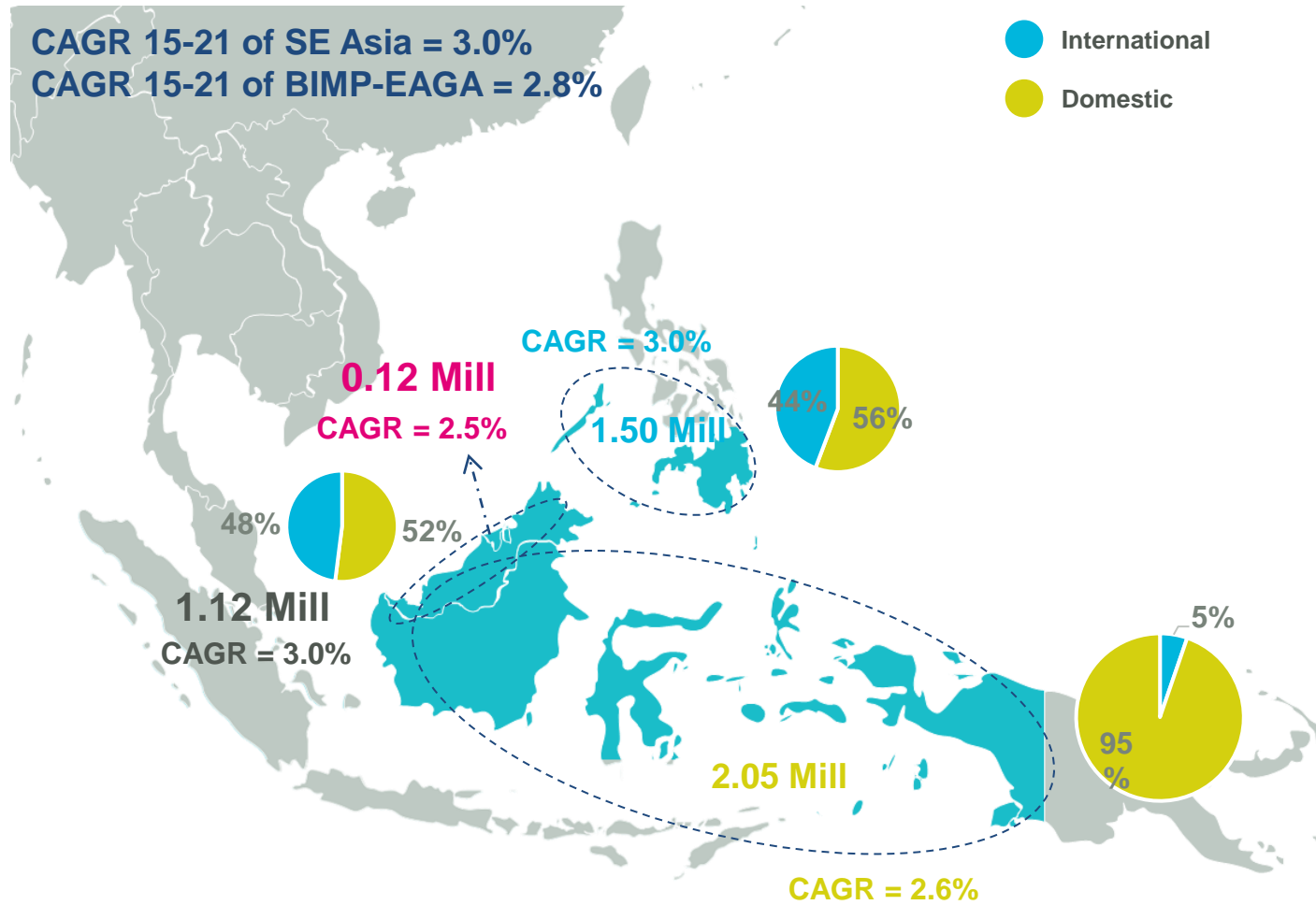


# BIMP-EAGA and Regional Shipping Market

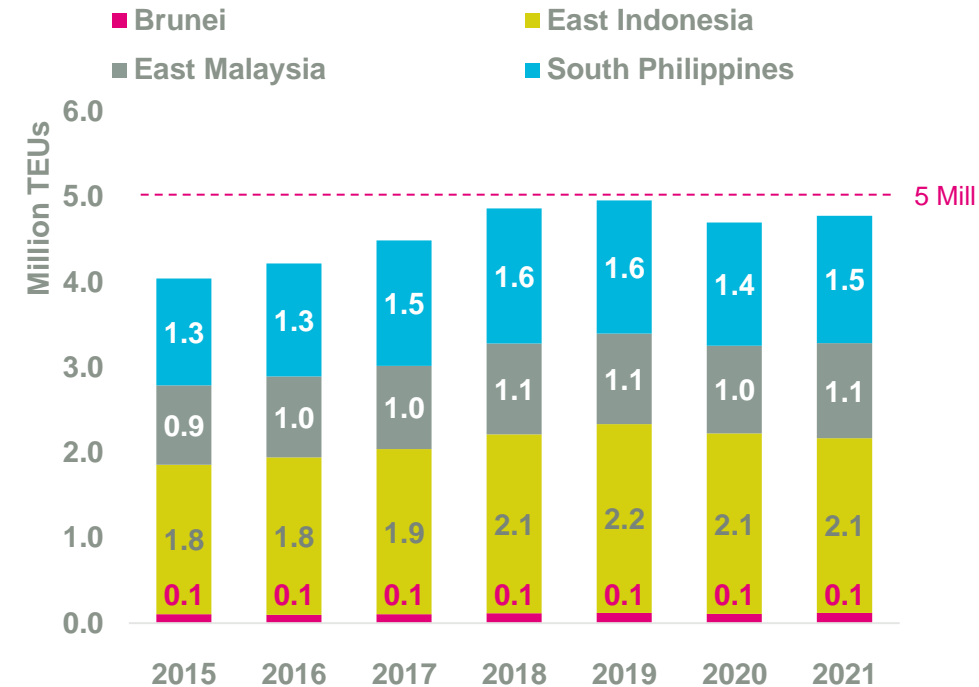


- BIMP-EAGA as a whole is a feeder region to (65%)
  - Malacca Strait Hubs – Singapore, PTP, Port Klang (85%)
  - Hubs in South/Southeast of Greater China – Hong Kong, Kaohsiung (15%)
- International direct call (i.e. intra-Asia, 35%)
  - Dedicated services to individual countries
  - Services to 2 out of the 3 BIMP-EAGA / one BIMP-EAGA one other ASEAN / all 3 BIMP-EAGA
- Various domestic / coastal services within each country with small vessels

# BIMP-EAGA – Cargo Market Overview

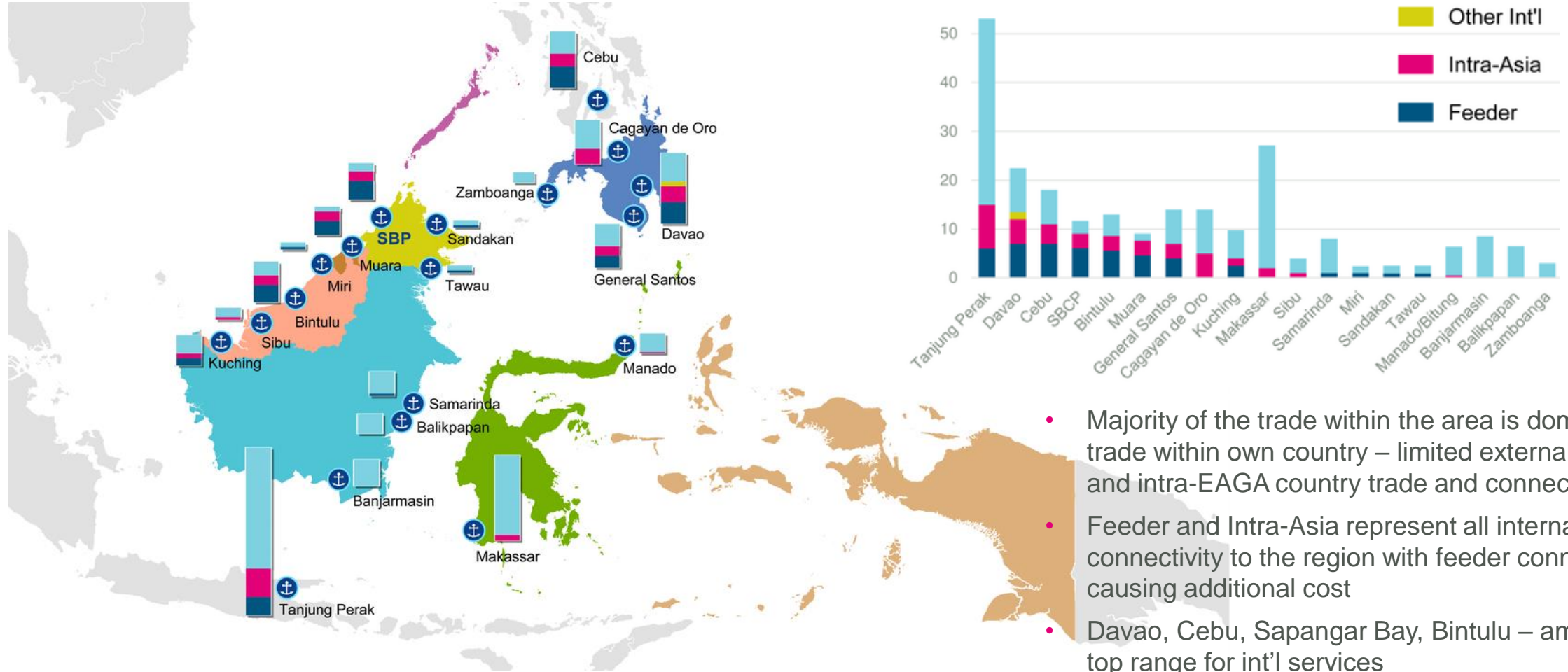


## BIMP-EAGA Container Throughput 2015-2021



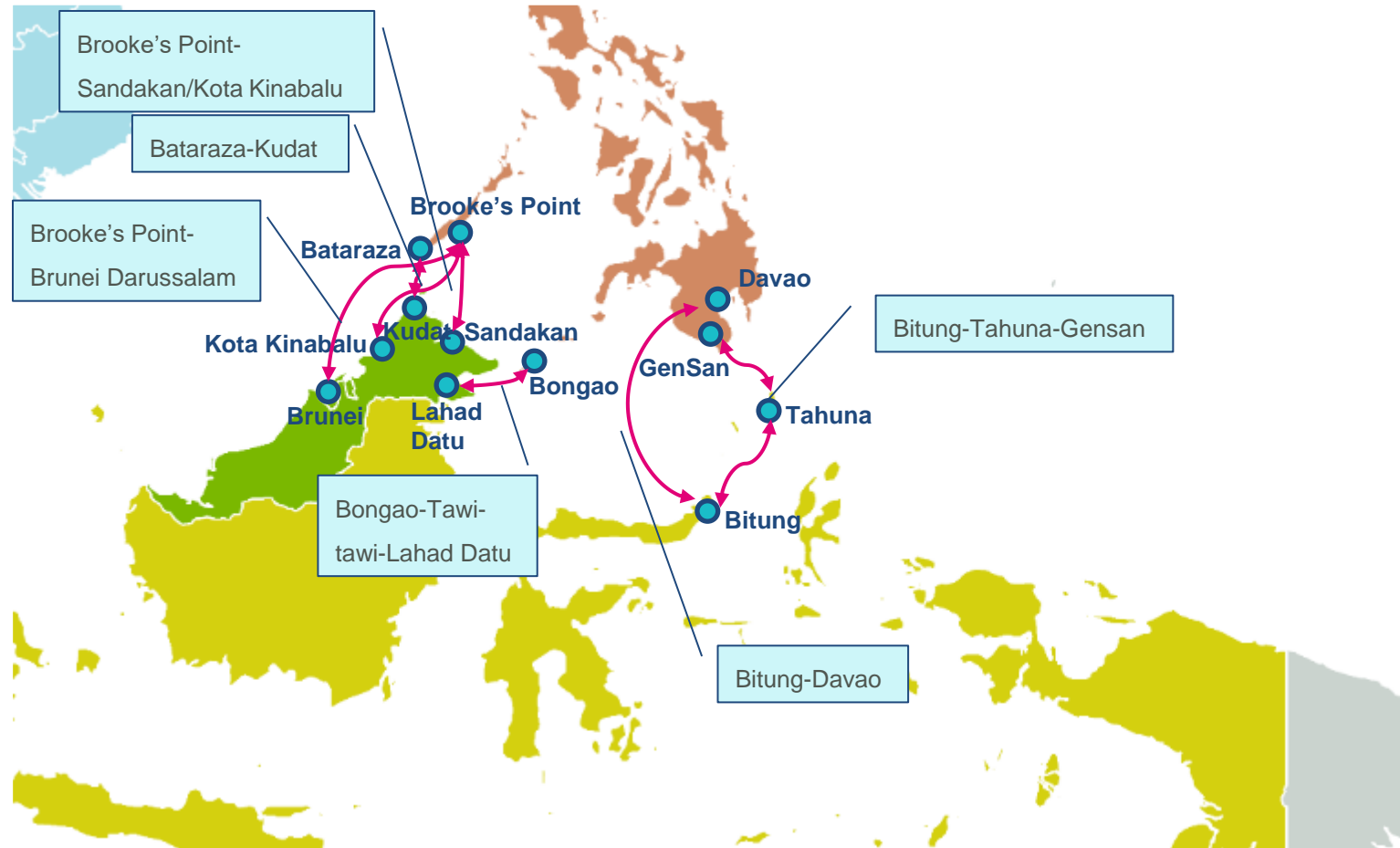
**2021 Total: 4.8 Million TEUs**  
**(4% of Southeast Asia Throughput)**

# BIMP-EAGA Port Connectivity



- Majority of the trade within the area is domestic trade within own country – limited external trade and intra-EAGA country trade and connectivity
- Feeder and Intra-Asia represent all international connectivity to the region with feeder connection causing additional cost
- Davao, Cebu, Sapangar Bay, Bintulu – among top range for int'l services

# Intra-EAGA Shipping Corridors Development



**Intra-EAGA shipping services establishment is a convergence project with the Agribusiness Cluster**

## Strategic Priorities

- Long-term food security in the subregion
- BIMP-EAGA rice project
- Production of high-quality marine shrimp for export in BIMP-EAGA
- Integration of cattle farming with oil palm production

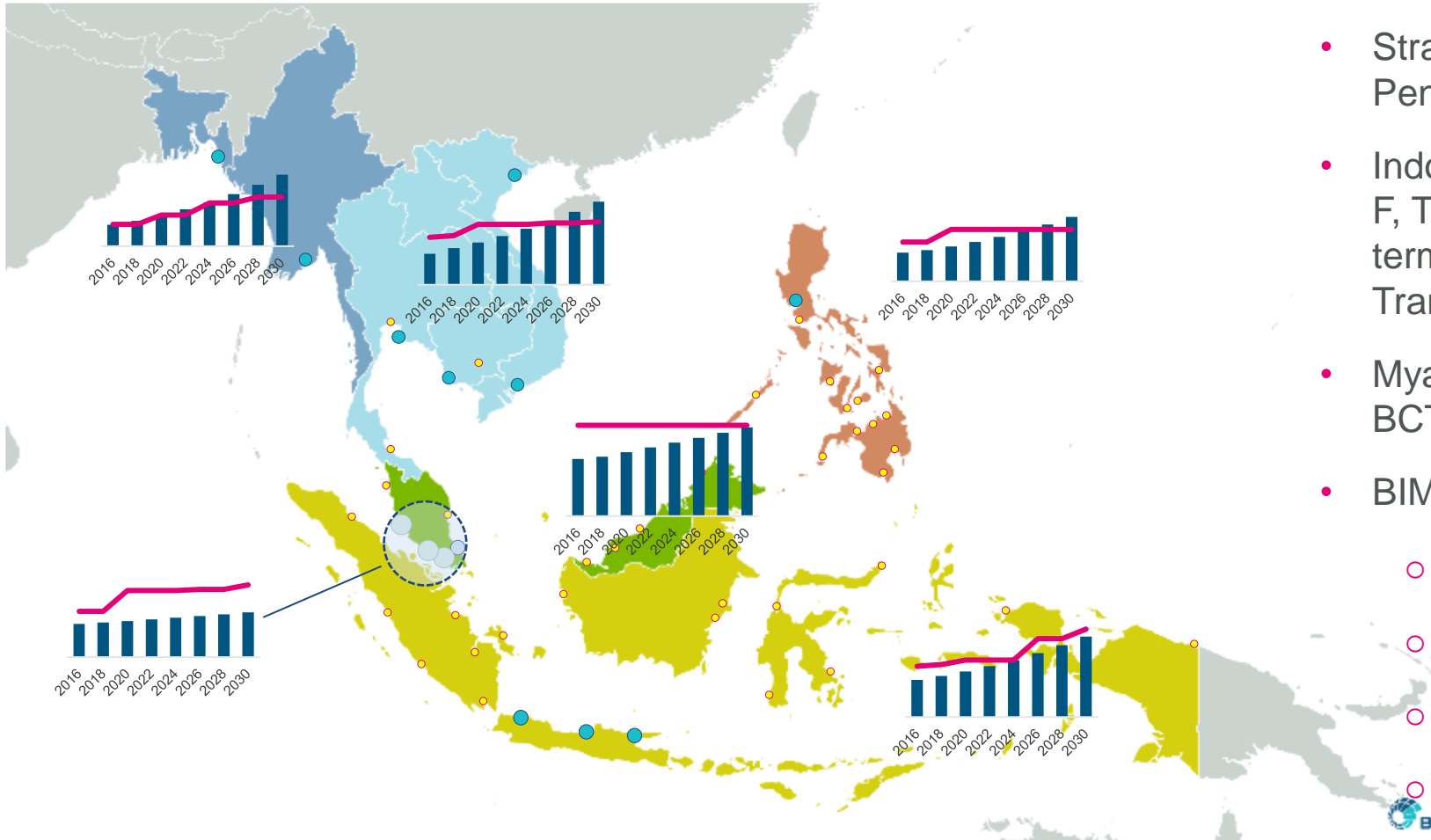
# BIMP-EAGA Seaports Development Projects



## Improved Transport Facilitation

- Implementation of a common permit scheme
- Support implementation of the Authorised Economic Operator (AEO) and Customs Transit Mechanism
- Time release study (TRS) in BIMP-EAGA ports
- Development of supply/value chains for priority commodities
- Increased participation of SMEs in corridor supply / value chains
- Improved joint public-private sector trade and investment promotion initiatives

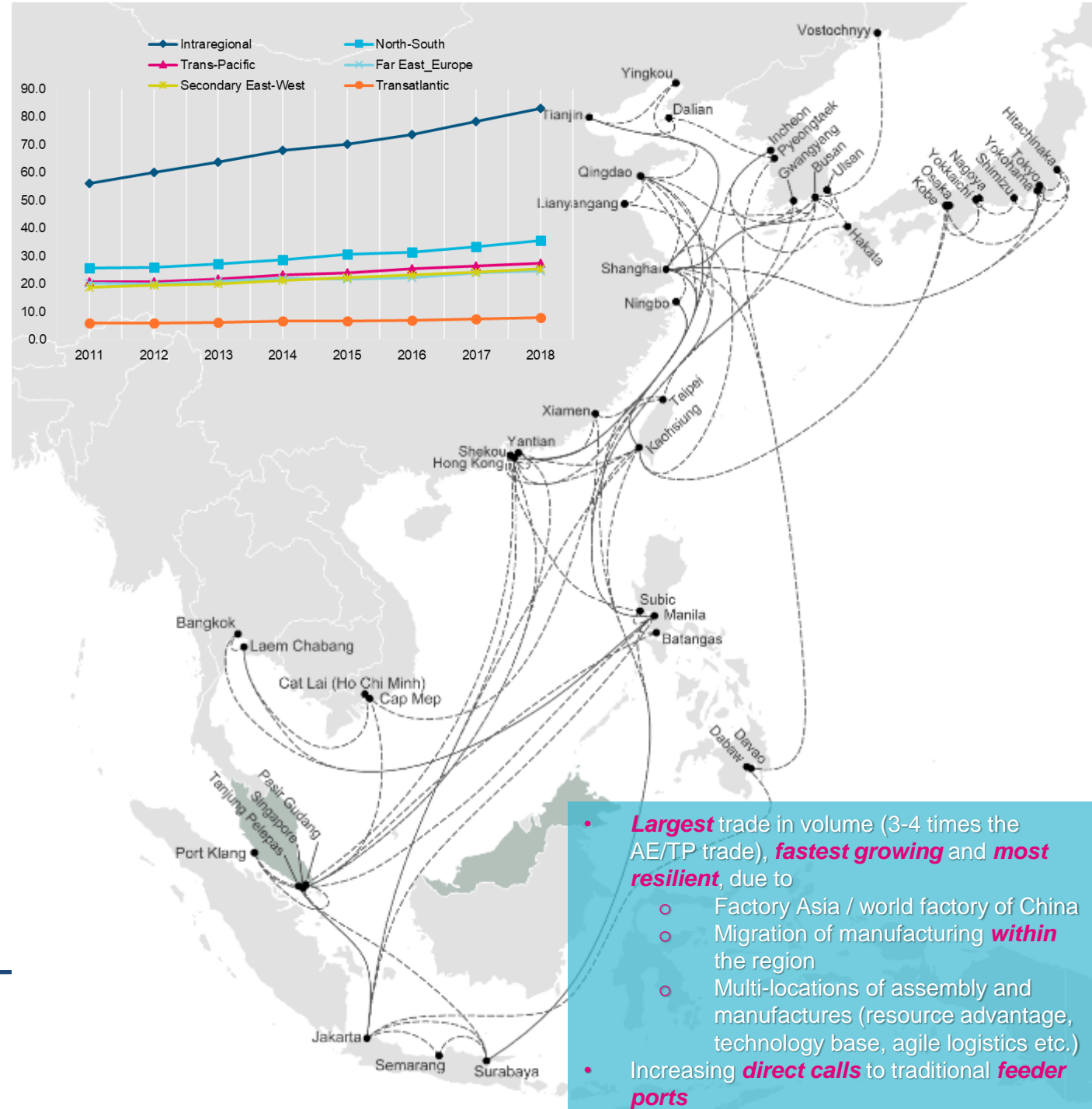
# Southeast Asia Port Demand & Supply



- Strait of Malacca – Tuas, Westports II, PTP, Penang, Pulau Carey
- Indochina – Laem Chabang (Terminal E & F, Terminal A, integration of A & B terminals), Lach Huyen, MSC Transshipment Port, Sihanoukville
- Myanmar / South Asia – Chittagong (NCT, BCT, Petenga, Bay Terminal), Yangon, Ayd
- BIMP-EAGA
  - Sapangar Bay (SBCP)
  - Manila North Port, Batangas
  - Makassar New Port
  - Bitung
  - Lamong, Gresik, Maspion

# BIMP-EAGA Opportunities

- Trend of regional manufacturing relocation – BIMP-EAGA positioning and opportunities
- Intra-Asia trade and gateway ports – gateway ports for BIMP-EAGA
- Network of gateway ports serving remote and less connected areas
- China COVID policy
- Supply chain re-design/re-configuration
- Future manufacturing hubs in Southeast Asia vs demand centres – regional hub-and-spoke and intra-regional complete supply chain, and role of BIMP-EAGA



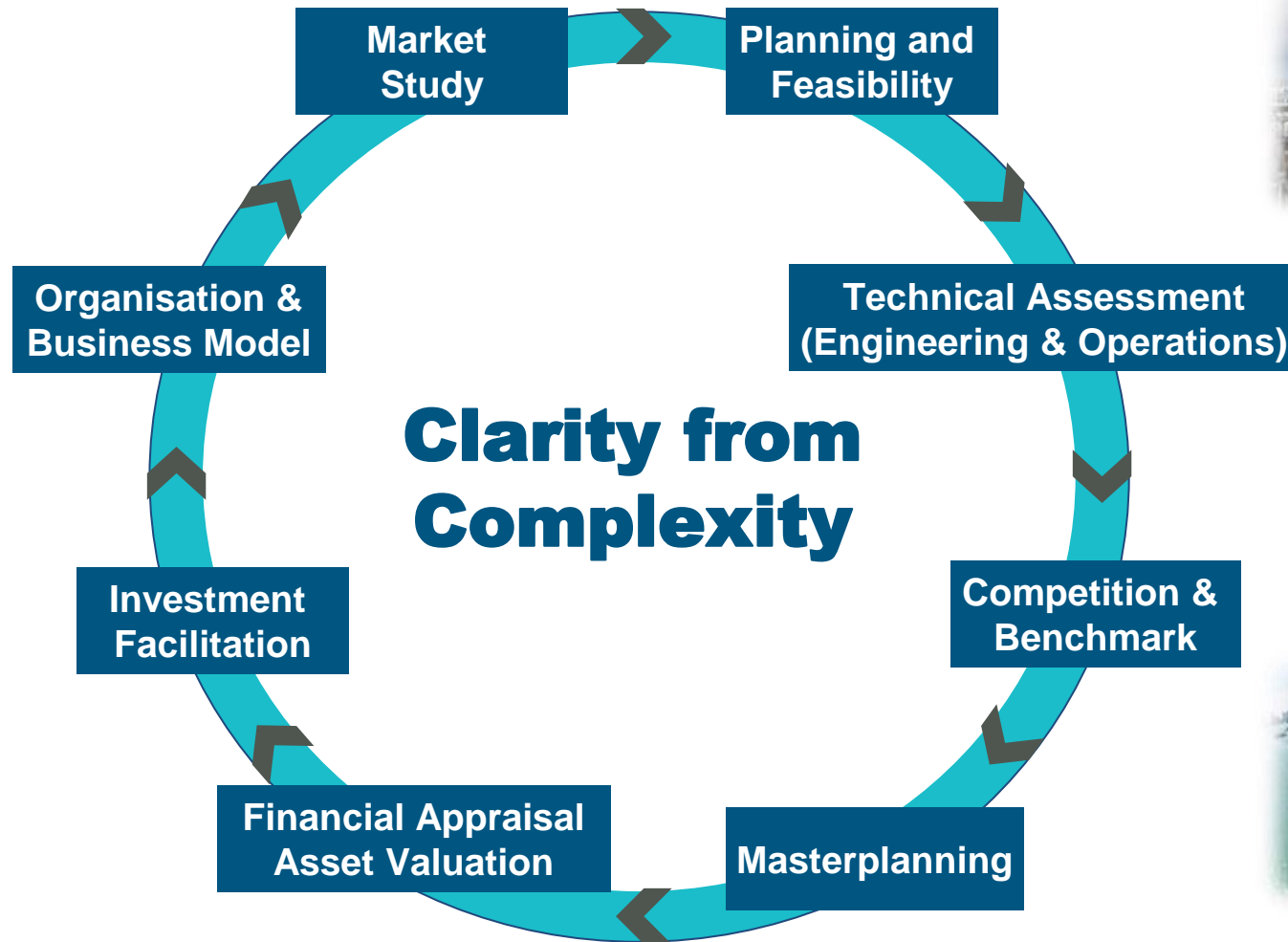
- **Largest** trade in volume (3-4 times the AE/TP trade), **fastest growing** and **most resilient**, due to
  - Factory Asia / world factory of China
  - Migration of manufacturing **within** the region
  - Multi-locations of assembly and manufactures (resource advantage, technology base, agile logistics etc.)
- Increasing **direct calls** to traditional **feeder ports**



# BMT Maritime Consultancy



# Integrated Solutions





# Thank you

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To learn more, please visit our websites

<http://www.bmt.org>

<https://www.bmt.org/where-we-work/coastal-infrastructure/>

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