

Unlocking the Potentials of a Supply Chain Economy

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Challenges

25%

Logistics Cost to percentage of sales (highest among ASEAN neighbors)

10%

Average Logistics Cost to percentage of sales (developed countries)

0.5-1

Average truck deliveries per day



SEMAR





BRUNEI DARUSSALAM
INDONESIA MALAYSIA
PHILIPPINES



PHILIPPINES

PALAWAN

**BRUNEI
DARUSSALAM**

MINDANAO

LABUAN SABAH

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Higher food, transportation prices push inflation up to 3.5% in December

Published January 5, 2021, 2:20 PM
by [Chino S. Leyco](#)

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Higher transport costs post-lockdown push June inflation to 2.5%


By Melissa Luz Lopez, CNN Philippines

Published Jul 7, 2020 9:24:39 AM

Updated Jul 7, 2020 10:55:00 AM

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99.45

Shell
FuelSave
Gasoline

97.24

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07.90



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Russia-Ukraine war, high fuel prices to drive up PH cargo transport rates

March 3, 2022

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PH among 'biggest losers' in Ukraine war

By Mayvelin U. Caraballo, Francis Earl Cueto and Javier Joe Ismael

February 26, 2022 8130

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<https://www.manilatimes.net/manilatimes/uploads/images/2022/02/26/50936.jpg>

Food Crisis: Malaysia Bans Chicken Exports

Annabelle Liang
24 May 2022



In this file photo, slaughtered chickens are displayed for sale at the Chow Kit wet market in Kuala Lumpur on 21 April, 2021. (AFP Photo)

Malaysia says it will cut the export of chickens from the start of June because of shortages in

Indonesia's palm oil export ban seen short-lived on limited storage

APR 26, 2022 10:10 PM PRT

REUTERS



Rice Giant Thailand Wants to Coordinate Price Hikes With Vietnam

- Thai premier says joint efforts can lift prices, help growers
- Rice trade already faces risk of a potential Indian export ban



Rice grain during harvesting in Sarabun Province, Thailand. Photographer: Andre Malerba/Bloomberg

Why everyone is freaking out about Target's inventory

Consumers are tired of buying so much stuff, much to the chagrin of retailers and transporters

Rachel Premack

2 weeks ago



		Percent change from Q1 2021 to Q1 2022
Walmart	Inventory	32.01%
	Sales	3.97%
Amazon	Inventory	46.70%
	Sales	7.58%
Home Depot	Inventory	31.91%
	Sales	3.75%
Costco	Inventory	26.10%
	Sales	16.31%
Walgreens	Inventory	4.75%
	Sales	14.70%
Target	Inventory	43.12%
	Sales	3.98%
Lowe's	Inventory	10.10%
	Sales	-3.12%
Best Buy	Inventory	9.39%
	Sales	-8.00%
Dollar General	Inventory	19.38%
	Sales	4.18%
TJX Companies	Inventory	36.66%
	Sales	13.09%

A visually unappealing comparison of inventory and sales at top retailers. Most of these concern February, March and April 2022 compared to the same period last year. Amazon's earnings reflect January through March and Walgreens' earnings December through February. Walgreens saw sales boost in part because we bought a lot of at-home COVID tests.





Logistics Performance

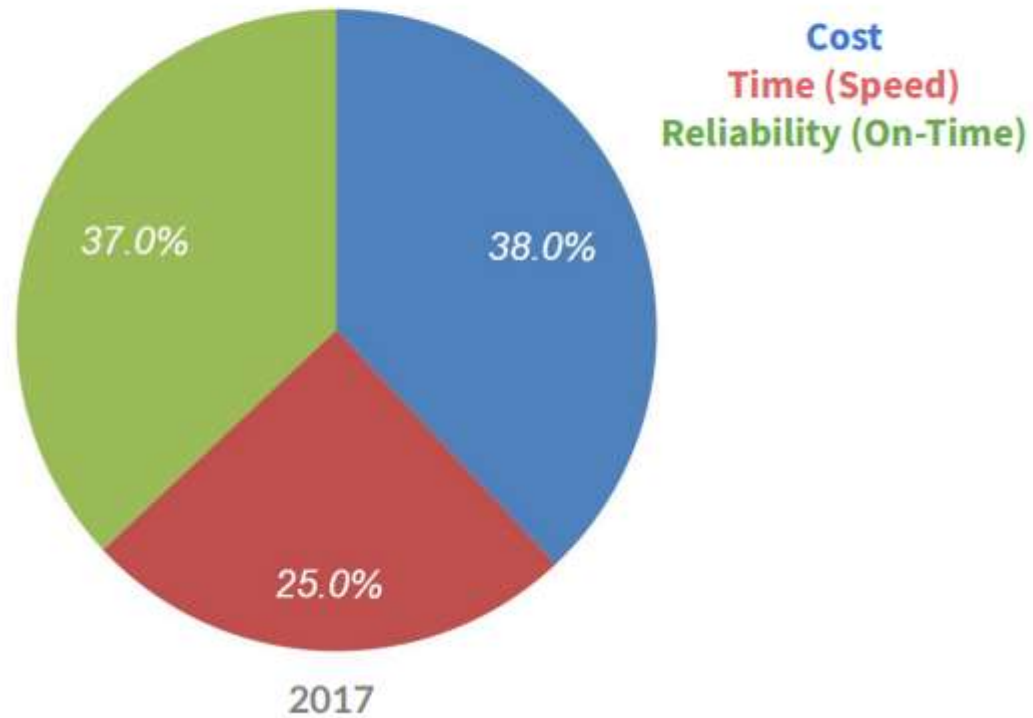
Cost
Time
Reliability

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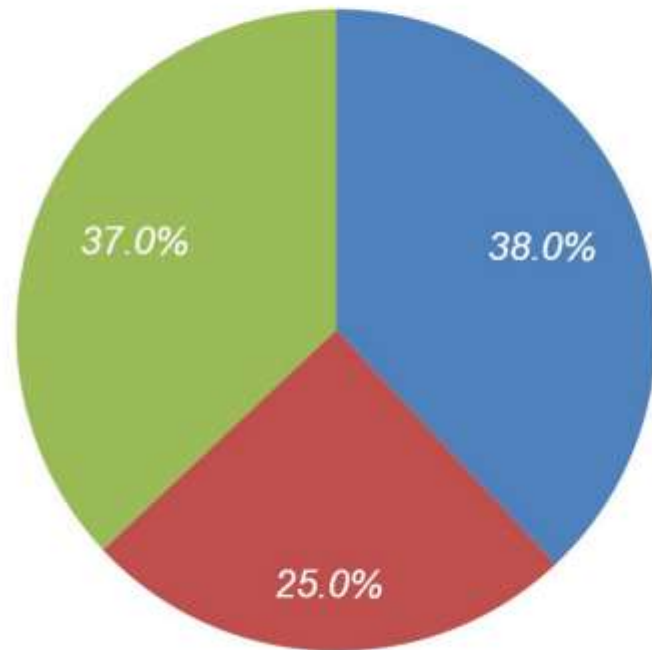
Performance through 3 dimensions



Performance through 3 dimensions 2017 vs 2022

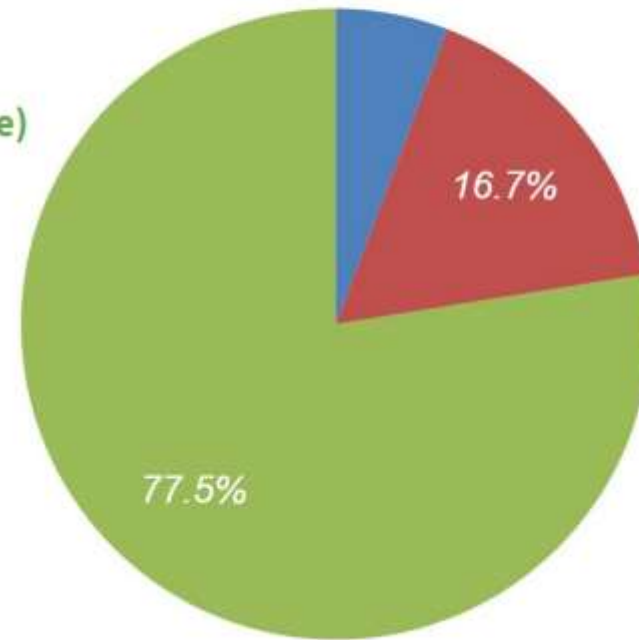


Performance through 3 dimensions 2017 vs 2022



2017

Cost
Time (Speed)
Reliability (On-Time)



2022

dti UPDAF

Transportation News

Taking a Look at Why Amazon Is Bringing Logistics In-House



If the company succeeds in meeting its promises to customers this year, that will be thanks to Amazon-chartered ships taking products from factories in Asia, Amazon Air cargo jets crisscrossing the U.S....

“Amazon has its own transportation network, it has access to all the carriers. Multiple ships, multiple factories.”

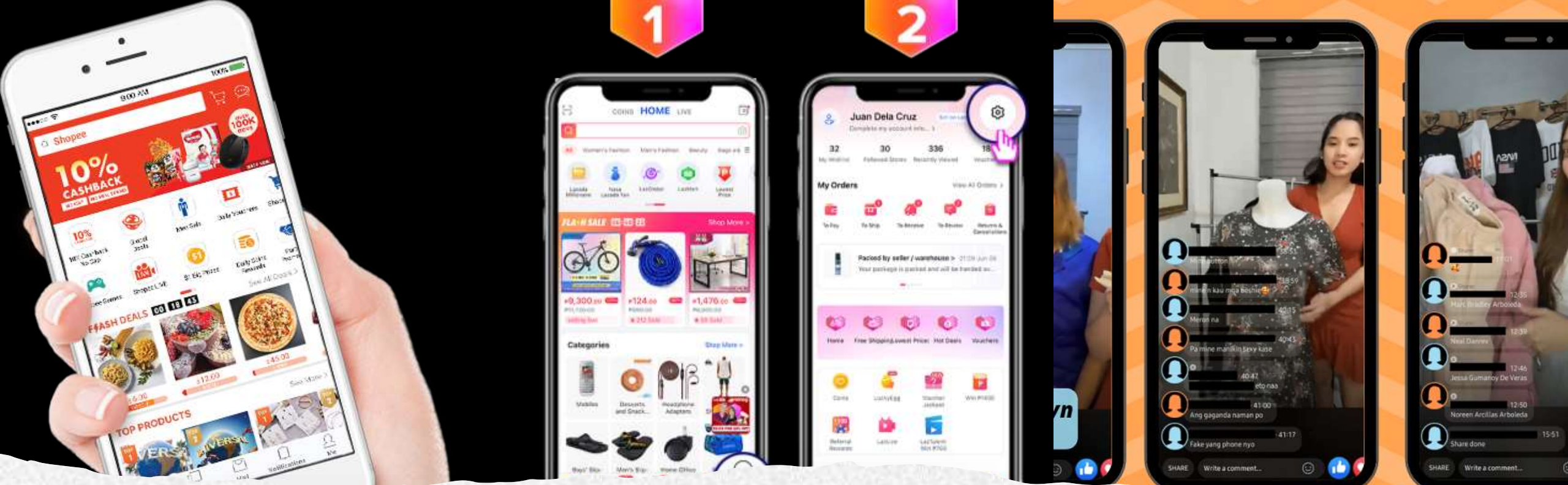
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How Tesla Avoided the Chip Problems That Hit GM and Other Car Makers



Now it's becoming clear that the company simply had a superior command of technology and its own supply chain. Tesla appeared to better forecast demand than businesses that produce many more cars than it does. Other automakers were surprised by how quickly the car market recovered from a steep drop early in the pandemic and had simply not ordered enough chips and parts fast enough.



Biggest Opportunity in Supply Chain: Ecommerce

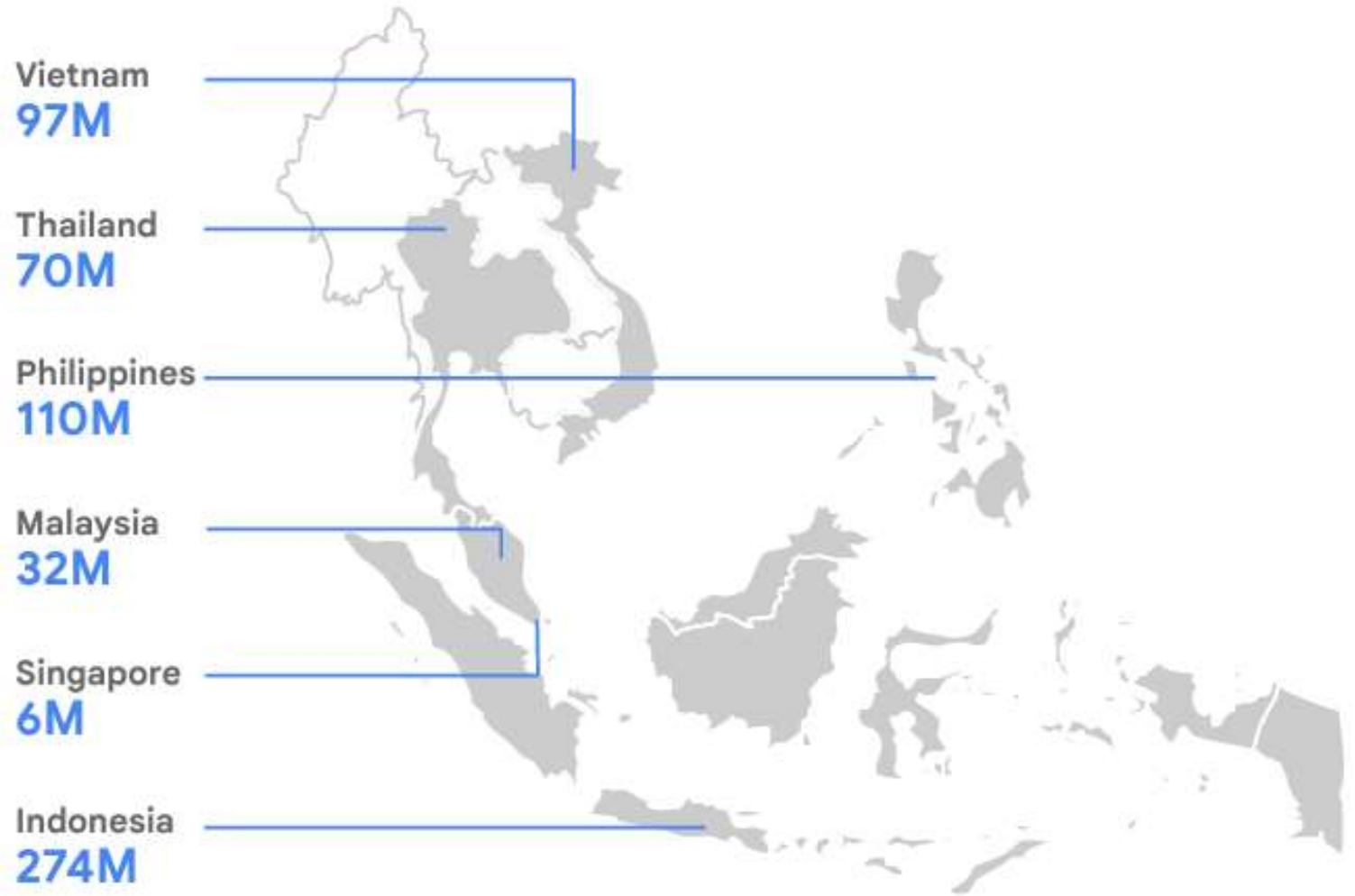
e-Conomy SEA covers **6 countries** in Southeast Asia



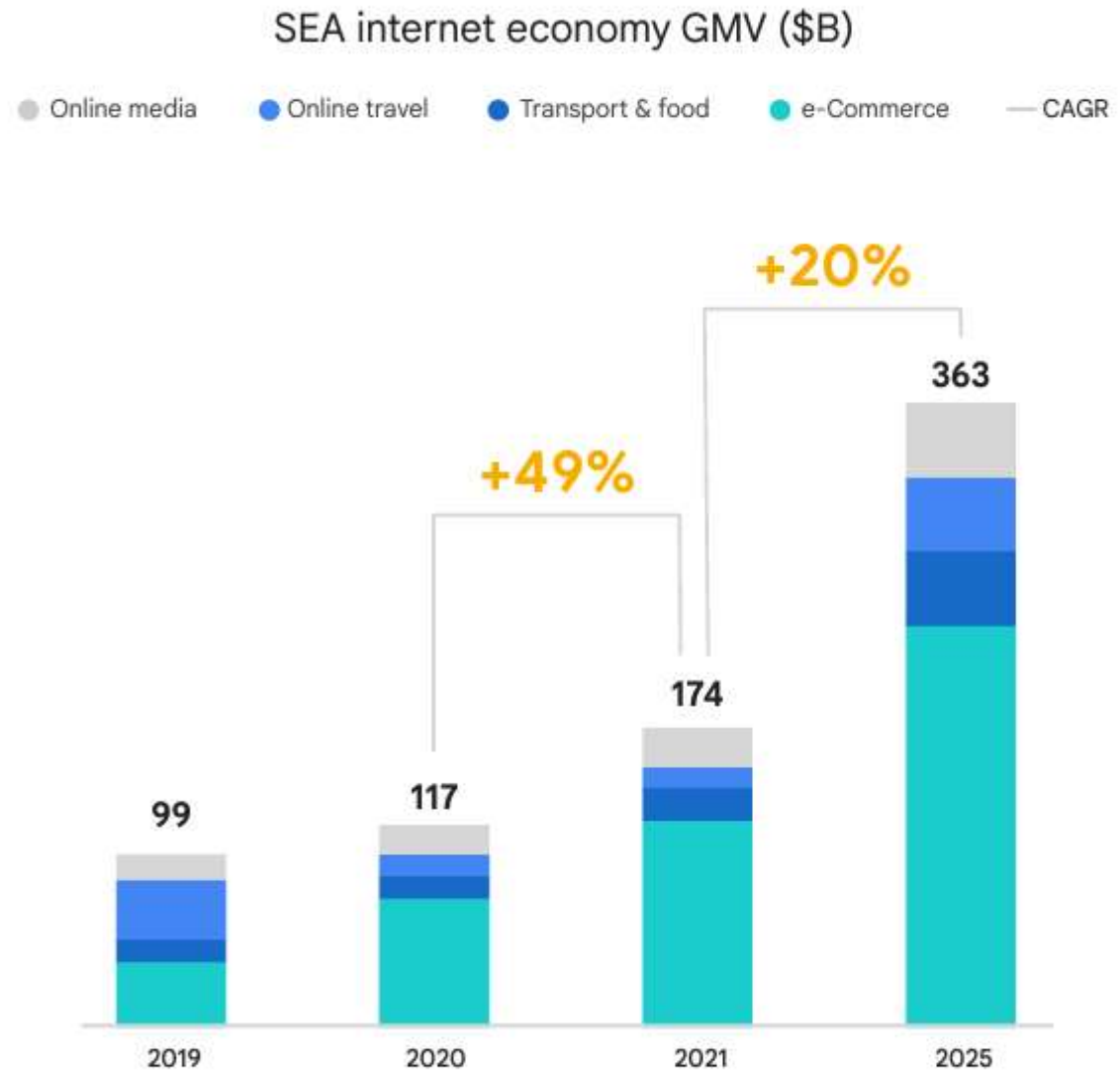
589M

total population
across the countries

Source: World Bank



Continued surge in **e-commerce** is driving most of the year's market growth

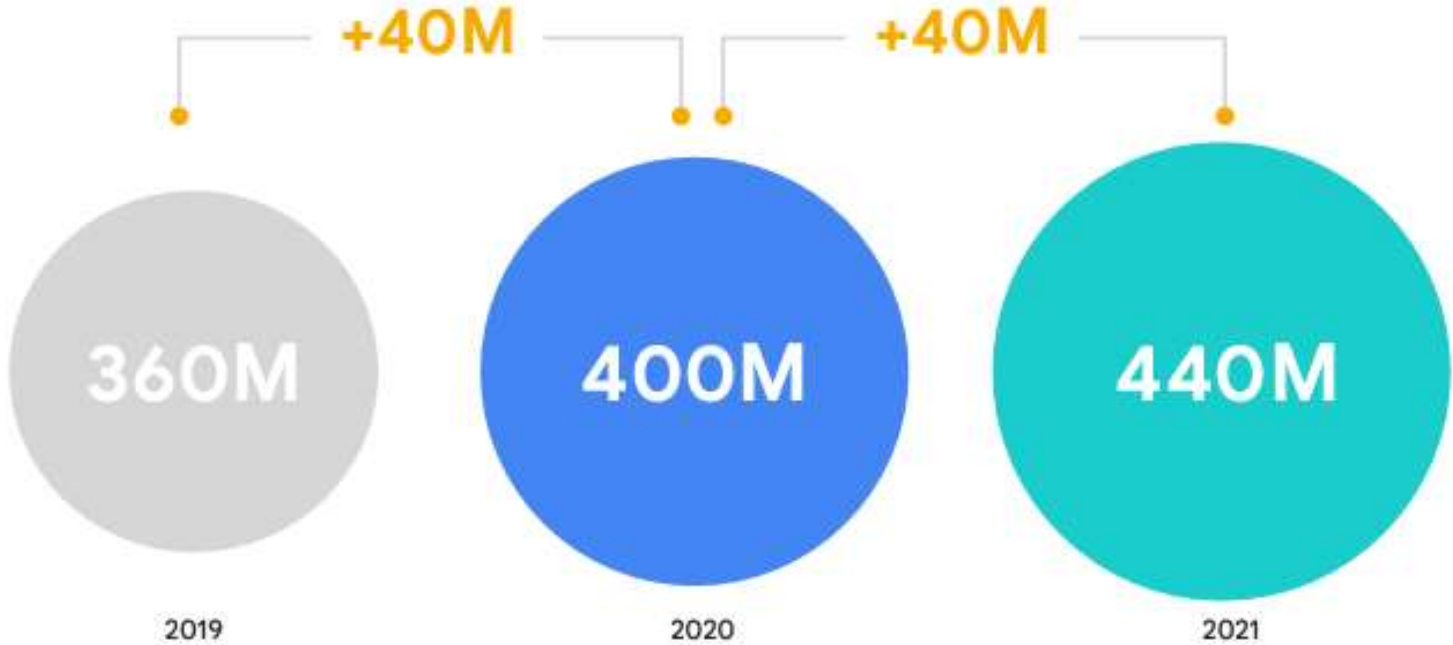


Source: Bain analysis.
Note: CAGR = Compounded Annual Growth Rate.

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SEA now has a total of **440M internet users**

Total internet users in SEA

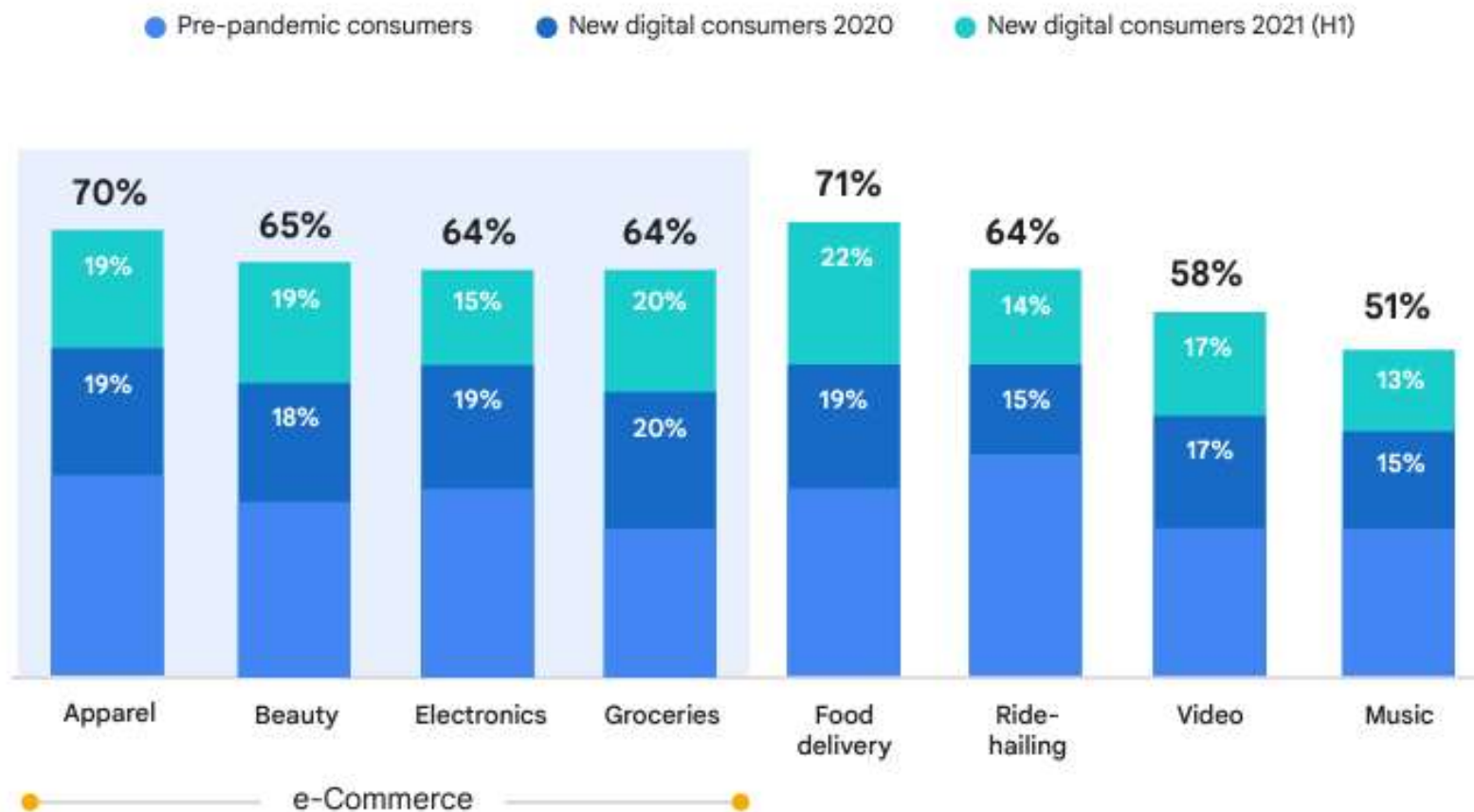


Source: Google, Temasek and Bain, e-Economy SEA 2019 and 2020; Statista for 2021.

Adoption across digital services is as strong in 2021 as it was at the onset of the pandemic

Food delivery saw the most substantial increase in adoption and has quickly become the most penetrated service

% of internet users across digital services



Source: Google-commissioned Kantar SEA e-Economy Research 2021.

S4. Which of the following online activities have you done before and when did you first start doing them?

Base: SEA internet users n=17,839.

All markets are exhibiting double-digit growth, with the Philippines leading by a margin

SEA internet economies, by GMV (\$B)



Source: Bain analysis.

Google TEMASEK BAIN & COMPANY

e-Commerce is the biggest growth driver and could continue to be until 2025; online travel faces a challenging recovery

GMV per sector (\$B)

— CAGR



Source: Bain analysis.

Google TEMASEK BAIN & COMPANY

Thank you

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