

10th PHILIPPINE

PORTS AND SHIPPING 2019

SOFITEL PHILIPPINE PLAZA MANILA, THE PHILIPPINES
TUESDAY 19 TO THURSDAY 21 FEBRUARY 2019

Reducing Bottlenecks in Logistics to Improve Supply Chain Movements

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Supply Chain Management Association of the Philippines

SEMAGO
**WORLD
CLASS!**

*We are a community that moves
the global competitiveness of the Philippine
supply chain industry.*



Connect. Engage. Move.

What is SCMAP?

- The Supply Chain Management Association of the Philippines is an association of companies committed to improving their supply chain management processes and professionalizing their supply chain practitioners.
- SCMAP was established in 1989 as the Distribution Management Association of the Philippines (DMAP).
- There are over 200 members at present across the country, with chapters established in Cebu, North Luzon and Davao.



2017 SCMAP
SUPPLY CHAIN
CONFERENCE
engage.
move.

go world class.
connect.
engage.
move.

The Three Pillars of SCMAP

Advocate

- SCMAP has advocated for fair and transparent transport costs, sensible traffic regulations, port modernization, and the development of the ASEAN RORO system
- SCMAP is currently engaged with the DPWH and DTI's ROLL IT program



The Three Pillars of SCMAP

Communicate

- A venue for discussing trends, ideas, best practices, concerns, challenges, and innovation within the supply chain profession
- Members are also updated on issues and development in supply chain through regular email updates, our biannual *Supply Chain Philippines* magazine and our fortnightly column in *PortCalls* newspaper

GENERAL MEMBERSHIP MEETING

17 August 2018—1pm to 5pm
Discovery Suites Manila, ADB Avenue, Ortigas Center, Pasig City



Why is shipping expensive?

As shipping rates return to focus, we look at what is being done to keep costs optimal and competitive—and discuss what else should be done.



The Three Pillars of SCMAP

Educate

- Making supply chain practitioners and stakeholders globally competitive
- Educating stakeholders on the relevance of supply chain management in nation building



Retailing. More fun in the
Philippines

Dairy Farm

RUSTAN SUPERCENTERS, INC.

Rustan's
SUPERMARKET

MARKETPLACE
by Rustan's

SHOP WISE **SHOP WISE** *express* **Wellcome**

HERO
The fresh food people

OLIVER'S
THE DELICATESSEN

Giant

ThreeSixty^o

Cold Storage
The fresh food people

MARKET PLACE
by JASONS

THE GOURMET GROCER
JASONS
SINCE 1975
FINE FOOD AND MORE

Mercato
d' marketplace

Lucky
SUPERMARKET

7-ELEVEN

YH 永辉超市
YONGHUI SUPERSTORES

IKEA

Sanmiu

美心 **Maxim's**

mannings

guardian

RosePharmacy

GNC
LIVE WELL

Our Goal

To give our customers across Asia
a store they **TRUST**, delivering
QUALITY, SERVICE, and VALUE.

And the journey continues...

**Dairy
Farm**



 **ROBINSONS
RETAIL
HOLDINGS, INC.**

RUSTAN SUPERCENTERS, INC.

 **Robinsons**
Department Store

 **Robinsons**
Supermarket

HANDYMAN


 **ROBINSONS**
BUILDERS

TrueValue

 **Robinsons**
Appliances

 **MINISTOP** 

southstar drug[®]

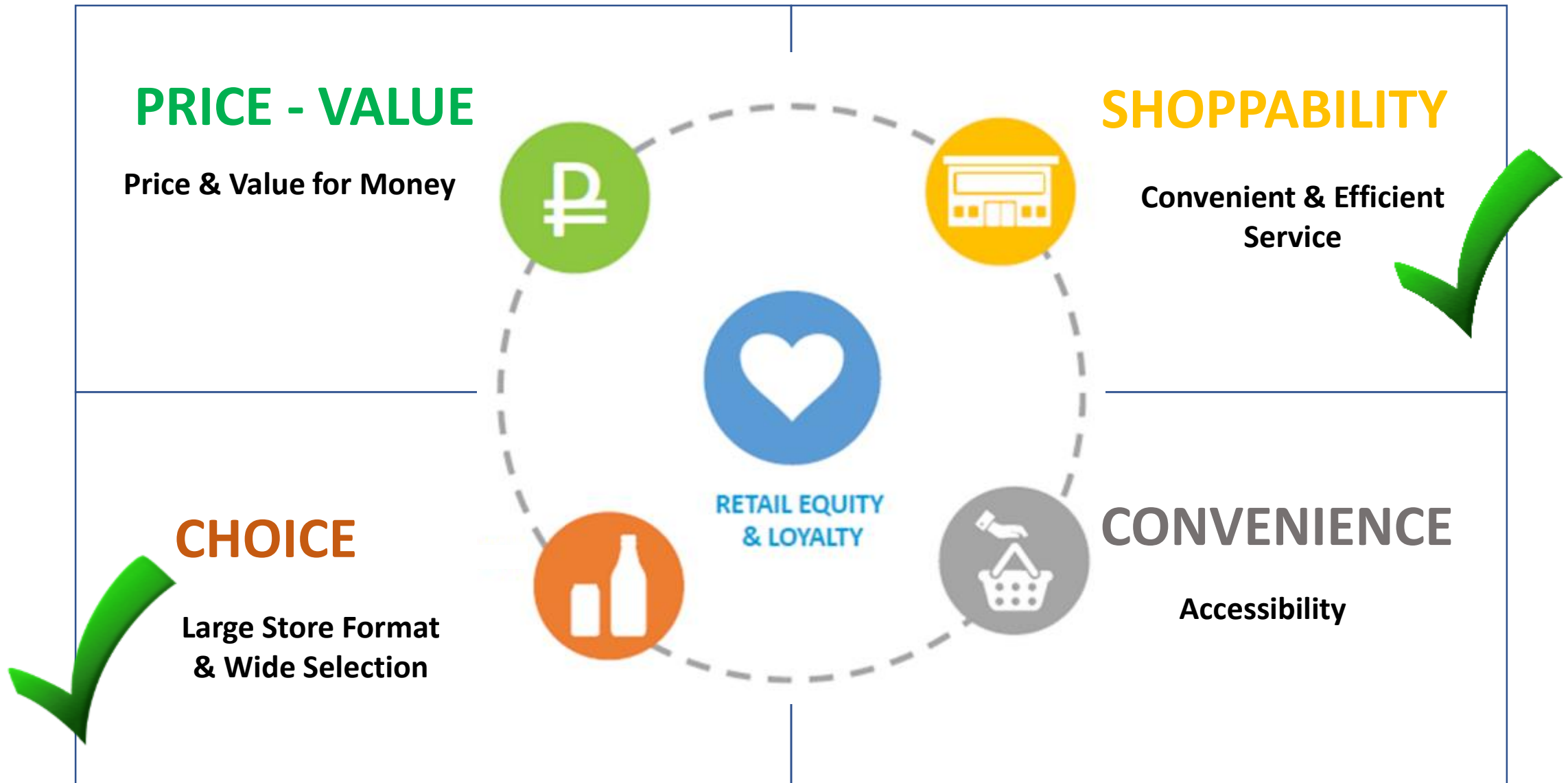
TGP[®]
THE GENERAL PHARMACY

Toys R Us[®]

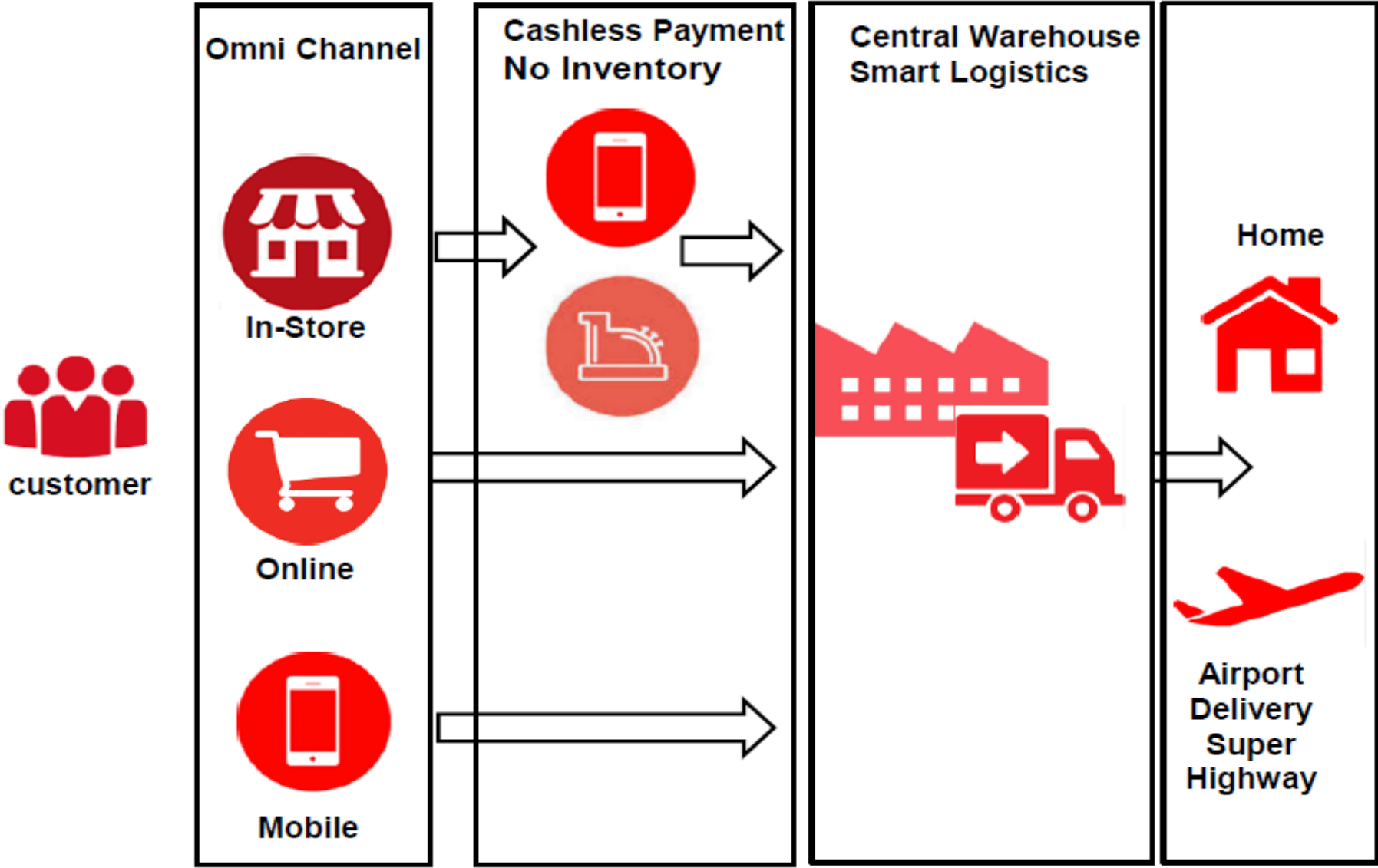
 **SAVERS**
SAVINGS

 **Robinsons**
SPECIALTY STORES, INC.

Retailers' Need for Differentiation



Integrated Retail System



RSCI Supply Chain



Ordering &
Replenishment



Import
Processing



Logistics
(Fresh & Dry)



Our Challenge



What We Work on Everyday

- Demand forecast
- Order quantity
- Storage capacity
- Days of Inventory
- Out-of-stocks, Overstocks
- Productivity
- Supply chain costs



“Okay, who has been charging the department happy hours to the Supply Chain budget?”

What keep us awake at night...



Reality Bites



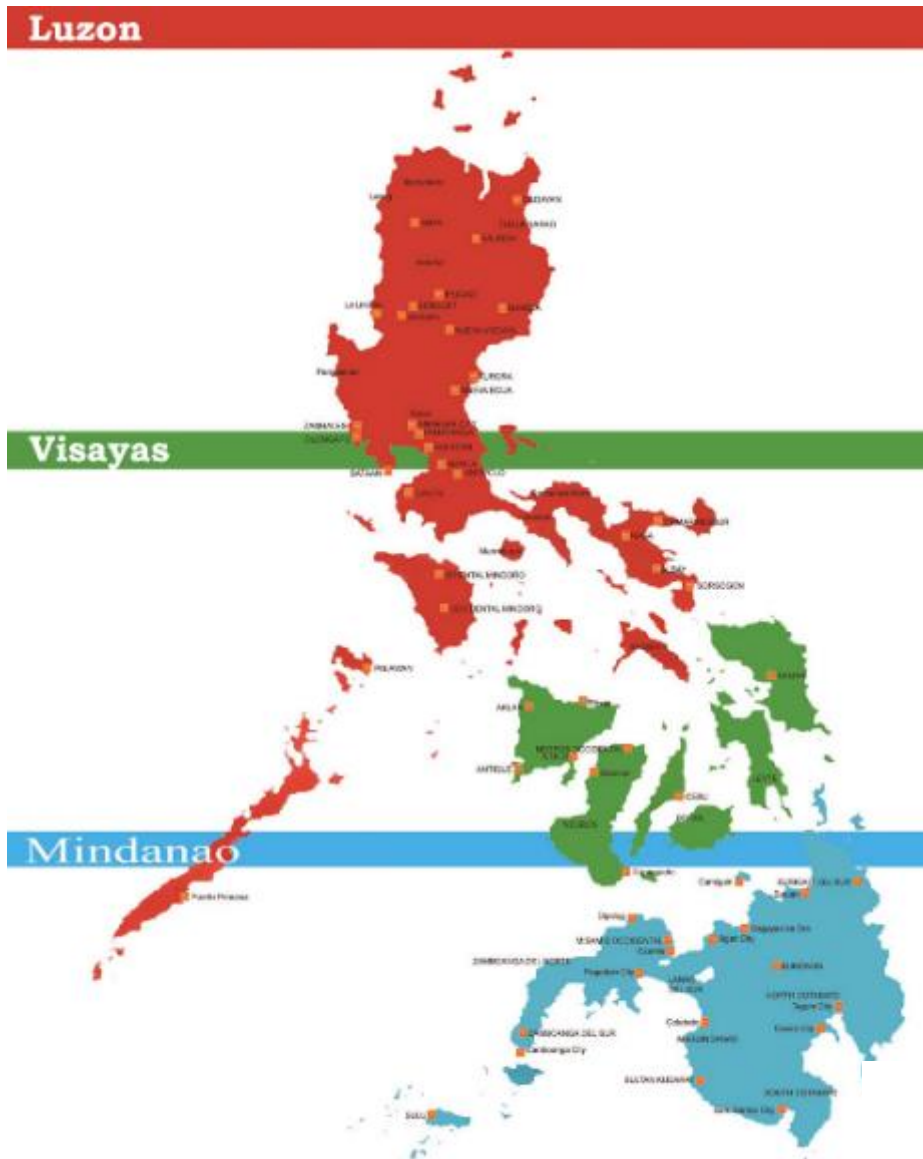
	2014	2015	2016	2017	2018
1	74	85	92	93	90
2	88	94	95	89	88
3	80	78	83	89	88
4	84	84	87	77	85
5	88	87	92	89	80
6	94	95	88	89	91
7	72	79	77	76	83
8	90	80	80	92	89
9	82	82	79	84	84
10	72	70	75	76	85
11	82	83	89	90	79
12	73	44	78	86	69
13	92	96	95	93	91
14	90	91	92	93	85
15	87	97	94	82	80
16	88	95	90	93	84
17	81	82	87	90	91
18	78	95	86	86	99
19	70	81	90	84	85
20	73	88	94	96	86
	82	84	87	87	86

What's Working

- Continuous Innovation & Strategies
- Technology
- Supplier Collaboration
- Third Party Logistics Providers



OPPORTUNITIES

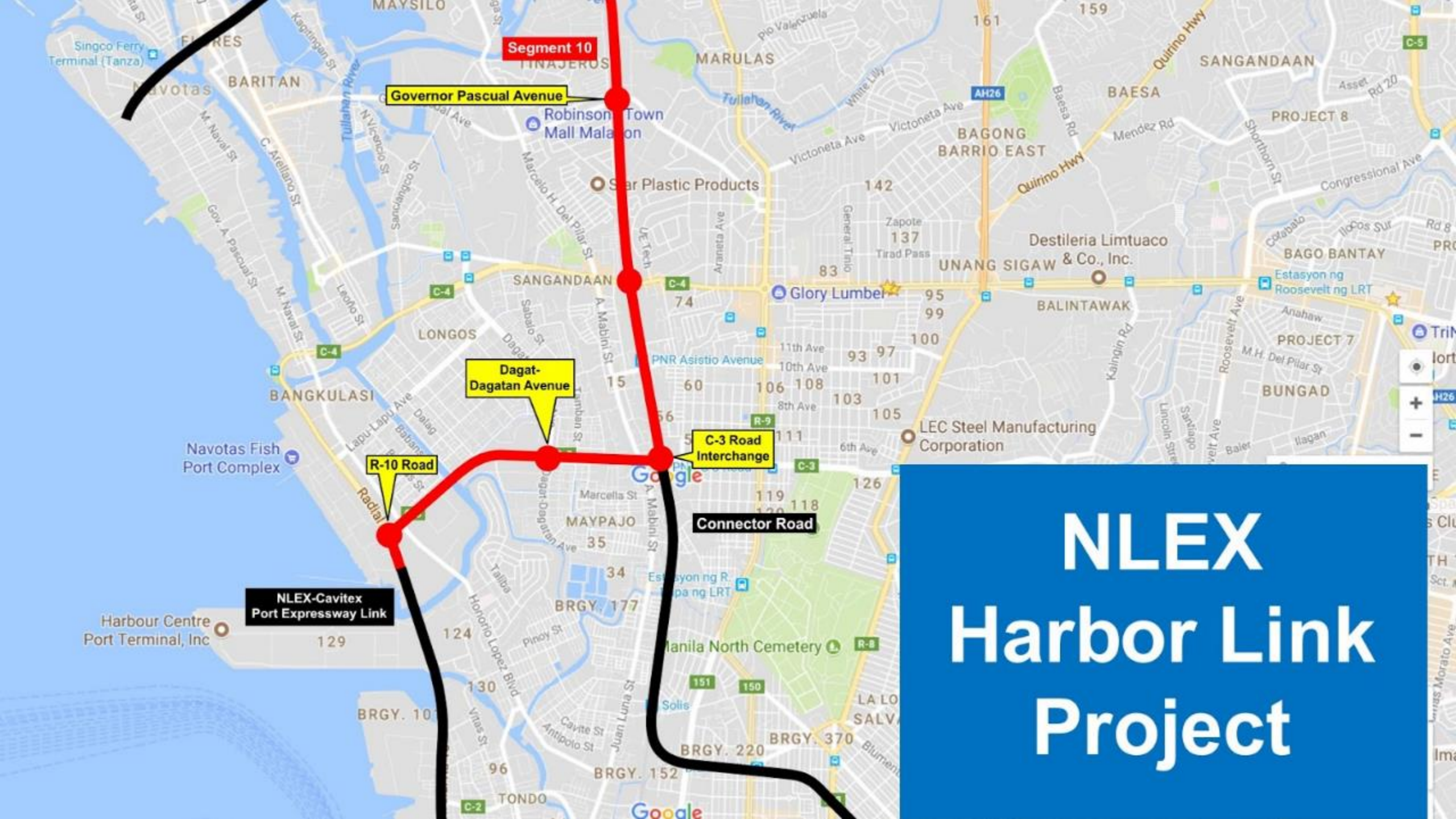


Customer in mind



Logistics Efficiency Index

Country	Year	LPI Rank	LPI Score ▼	Customs ?	Infrastructure ?	International shipments ?	Logistics competence ?	Tracking & tracing ?	Timeliness ?
Germany	2018	1	4.20	4.09	4.37	3.86	4.31	4.24	4.39
Sweden	2018	2	4.05	4.05	4.24	3.92	3.98	3.88	4.28
Belgium	2018	3	4.04	3.66	3.98	3.99	4.13	4.05	4.41
Austria	2018	4	4.03	3.71	4.18	3.88	4.08	4.09	4.25
Japan	2018	5	4.03	3.99	4.25	3.59	4.09	4.05	4.25
Netherlands	2018	6	4.02	3.92	4.21	3.68	4.09	4.02	4.25
Singapore	2018	7	4.00	3.89	4.06	3.58	4.10	4.08	4.32
Denmark	2018	8	3.99	3.92	3.96	3.53	4.01	4.18	4.41
United Kingdom	2018	9	3.99	3.77	4.03	3.67	4.05	4.11	4.33
Finland	2018	10	3.97	3.82	4.00	3.56	3.89	4.32	4.28
United Arab Emirates	2018	11	3.96	3.63	4.02	3.85	3.92	3.96	4.38
Hong Kong, China	2018	12	3.92	3.81	3.97	3.77	3.93	3.92	4.14
Philippines	2018	60	2.90	2.53	2.73	3.29	2.78	3.06	2.98



Segment 10

Governor Pascual Avenue

Dagat-Dagatan Avenue

R-10 Road

C-3 Road Interchange

Connector Road

NLEX-Cavite Port Expressway Link

NLEX Harbor Link Project

The Ten Commitments of the Philippine Logistics Sector

- Customer Service
- Economic Development
- Job Creation

1



We recognize supply chain management, particularly logistics, as a necessary component of any competitive business. We shall give priority to initiatives that will realize our vision of a "globally competitive logistics services sectors that enables business to provide its customers with the right product, at the right time, in the right price and quality, in a reliable manner".



**Republic Act
No. 11032**

**Ease of Doing Business
and Efficient Government
Service Delivery Act**

Draft PH order regulating foreign liners' fees awaits feedback

Posted by Liza Almonte on February 18, 2019



Industry associations, port operators take steps to solve problem with empty containers in PH

Posted by Liza Almonte on February 19, 2019



Manila South Harbor, the flagship terminal of Asian Terminals Inc. Photo courtesy of ATI



The Association of International Shipping Lines (AISL), Alliance of Concerned Truck Owners and Organizations (ACTOO), Container Depot Alliance of the Philippines (CDAP) and International Container Terminal Services, Inc. (ICTSI) have agreed to undertake immediate measures to alleviate problems connected with returning empty containers.

In a separate meeting, Asian Terminals Inc. (ATI) and several international shipping lines also agreed to collaborate in moving out thousands of empty containers via Manila South Harbor in the next few weeks to also address the build-up of empty containers in the supply chain.

Thank you