

Clark Airport Support Services Corp.



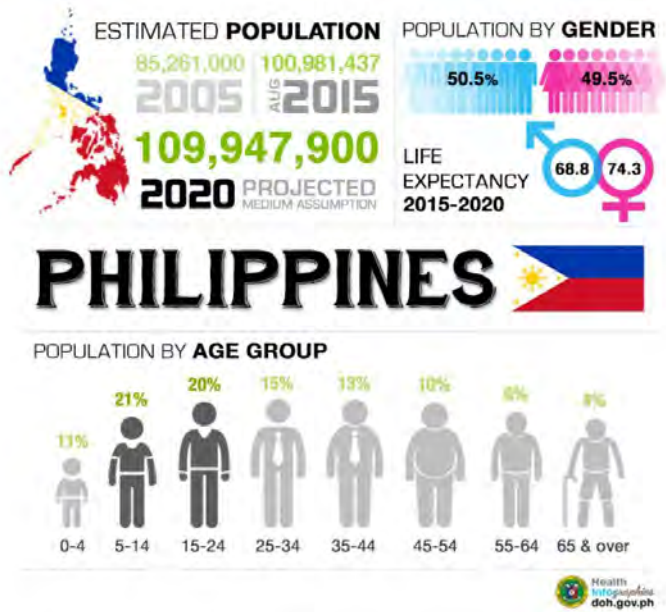
10<sup>th</sup> Philippine Ports and Shipping Conference  
20 February 2019, Manila Philippines

# TRANSNATIONAL DIVERSIFIED GROUP





# THE PHILIPPINE POPULATION + IMPORT & EXPORT



**NEED TO IMPROVE SEA PORT GATEWAYS**

## TOTAL MANILA LADEN THROUGHPUT

**IMPORT** 1,871,333 TEUs

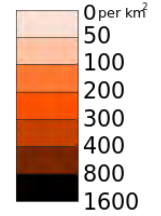
**EXPORT** 530,327 TEUs

## TTL PH vs 2017

**75 %** +7 %

**55 %** +1 %

Population Density Map per Province  
 Philippines  
 National Population Density as 2009: 307.344/km<sup>2</sup>



**NORTH LUZON – 21%**

**SUBIC – 3%**

**METRO MANILA – 13%**

**MANILA – 75%**

**SOUTH LUZON – 23%**

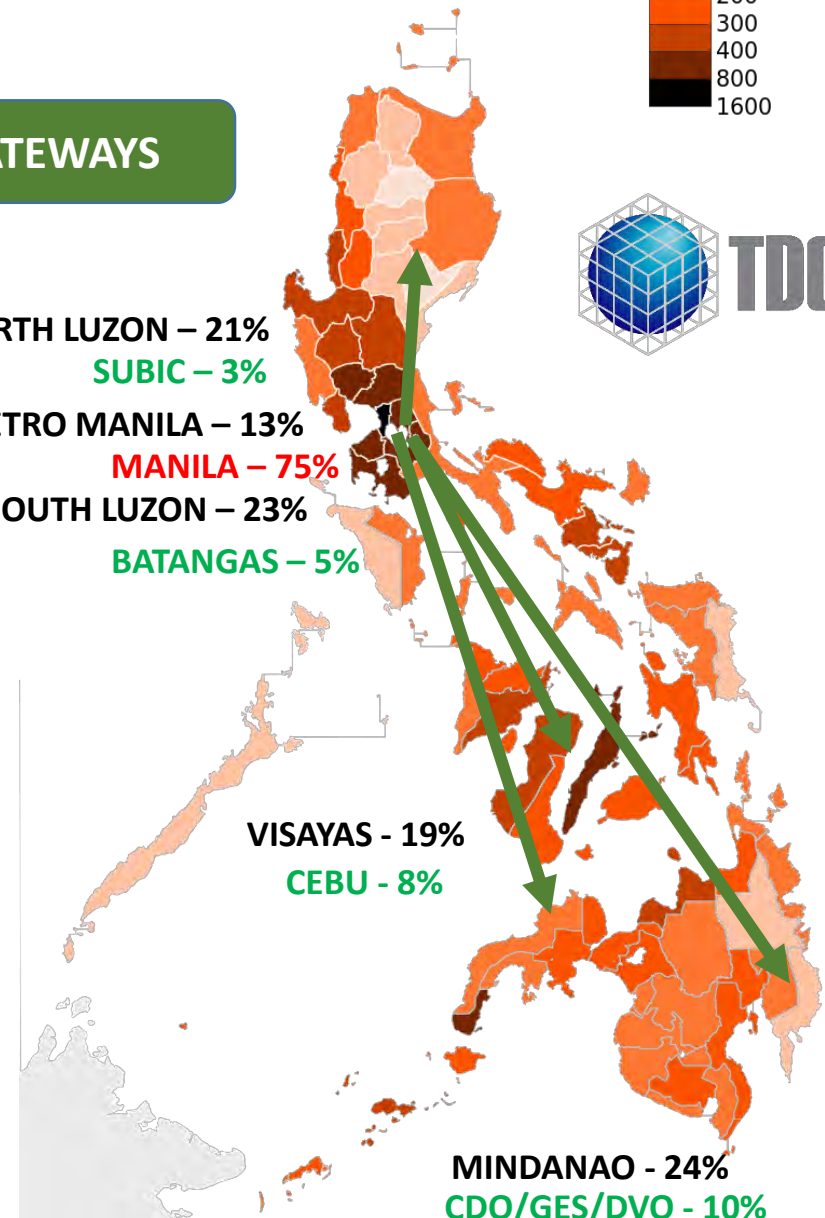
**BATANGAS – 5%**

**VISAYAS - 19%**

**CEBU - 8%**

**MINDANAO - 24%**

**CDO/GES/DVO - 10%**



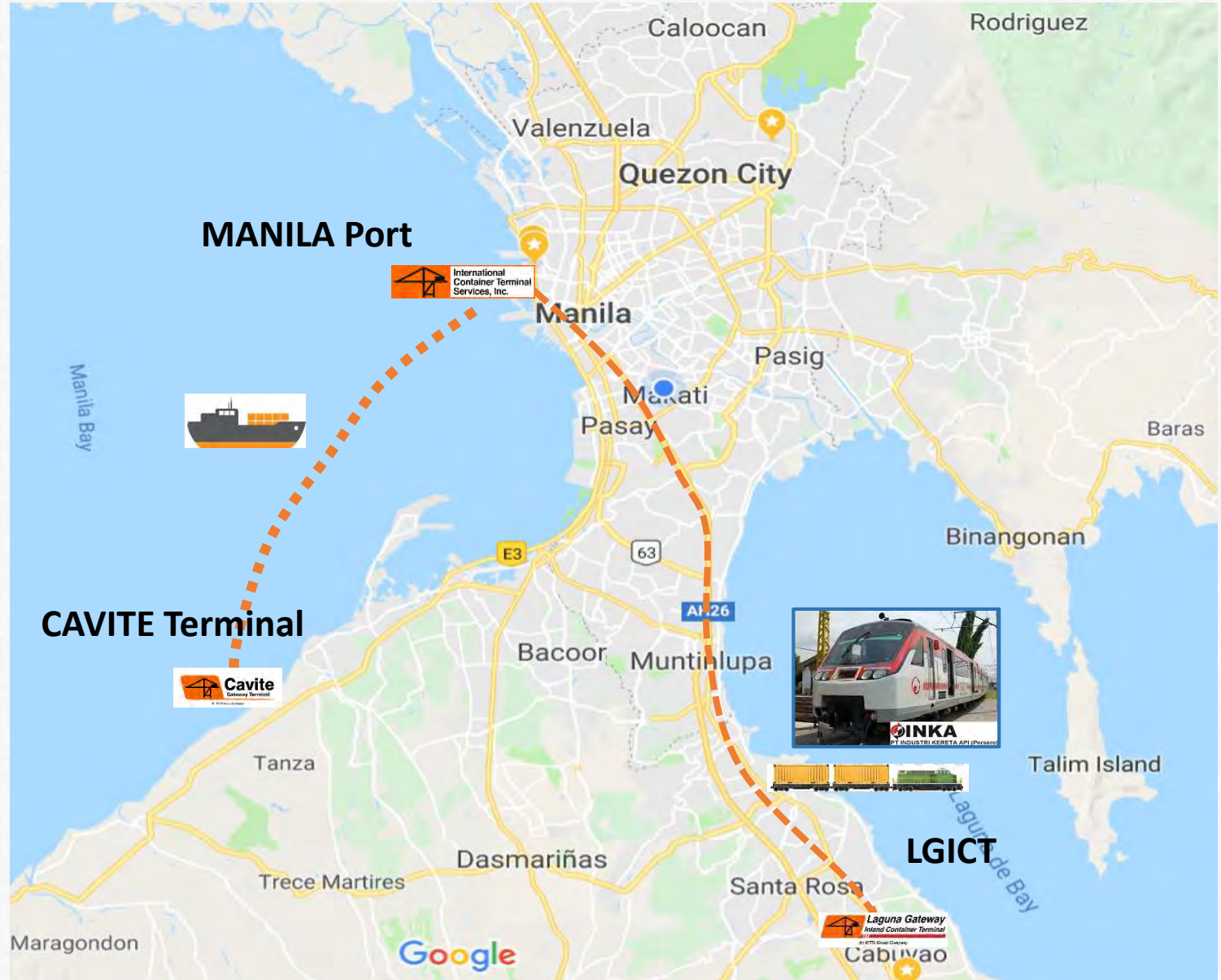
# Development of Ports / Terminals - MANILA



**JUNE 2018 – FIRST BARGE TERMINAL**

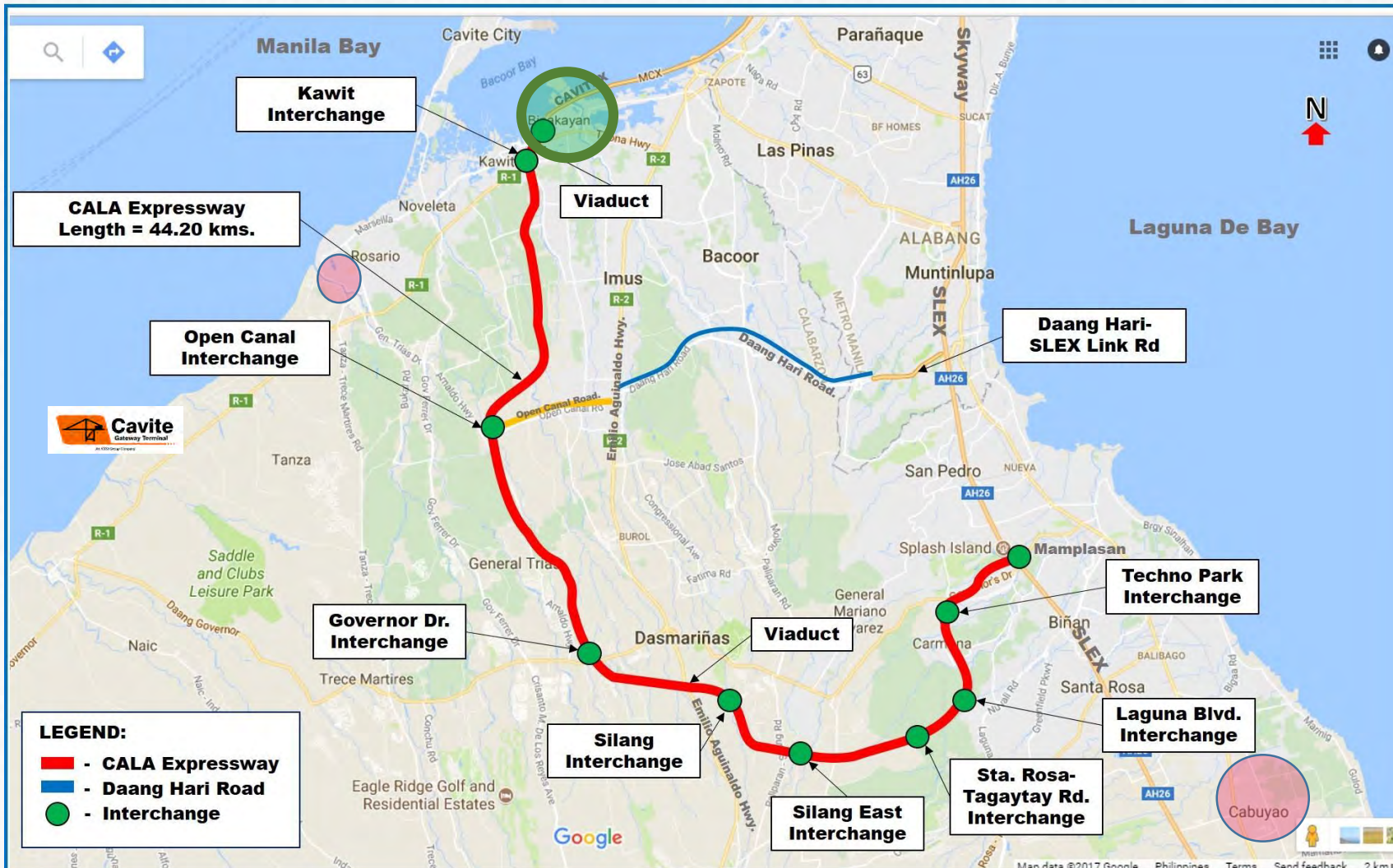


**ALTERNATIVES BEYOND MANILA  
ROADS**





# Positioning in Key Areas in/near Greater Metro Manila



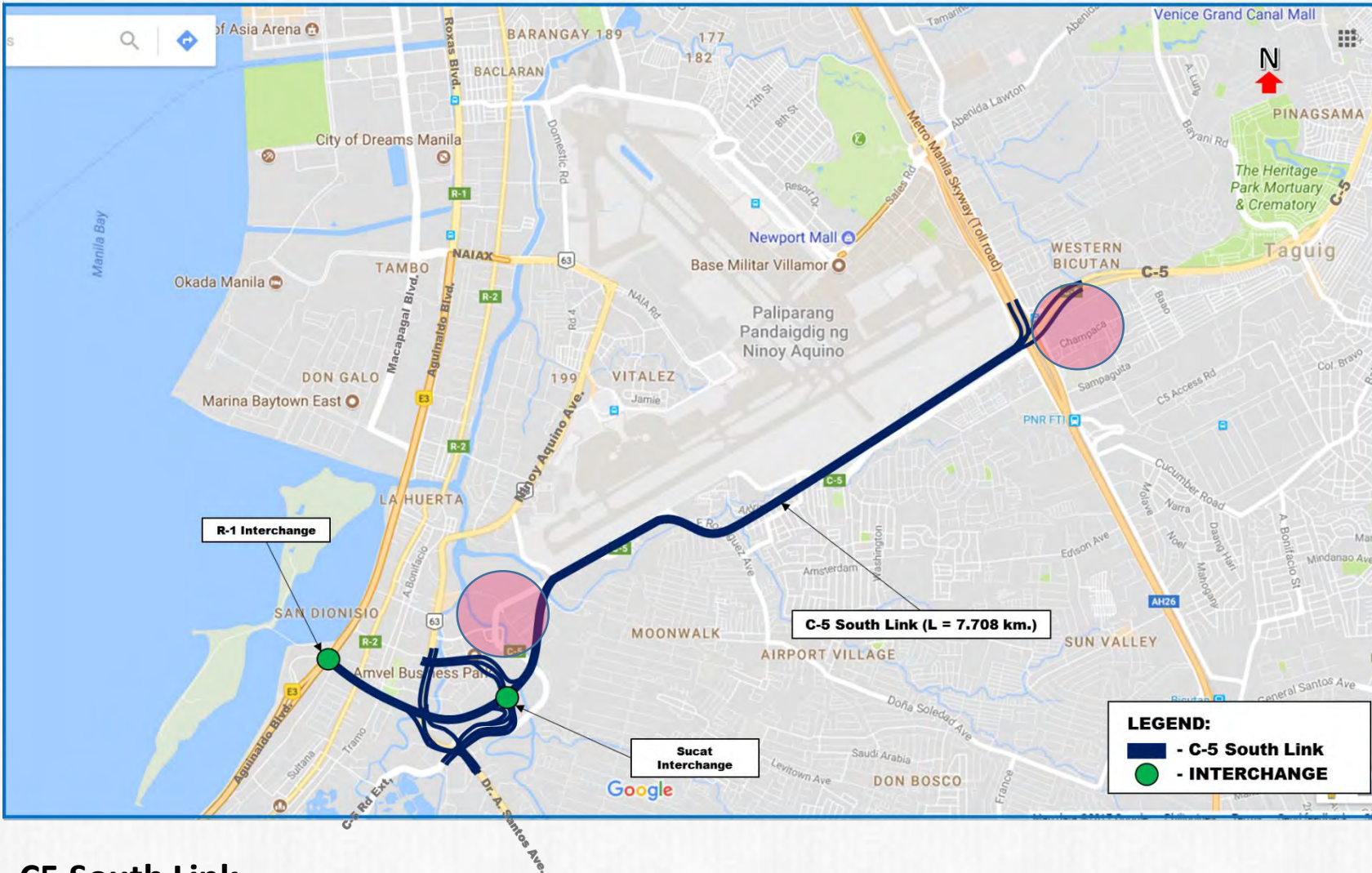
**CAVITE LAGUNA Expressway (CALAX)**

**Start : 19 June 2017**

**Completion : 2020**



# Positioning in Key Areas in Greater Metro Manila



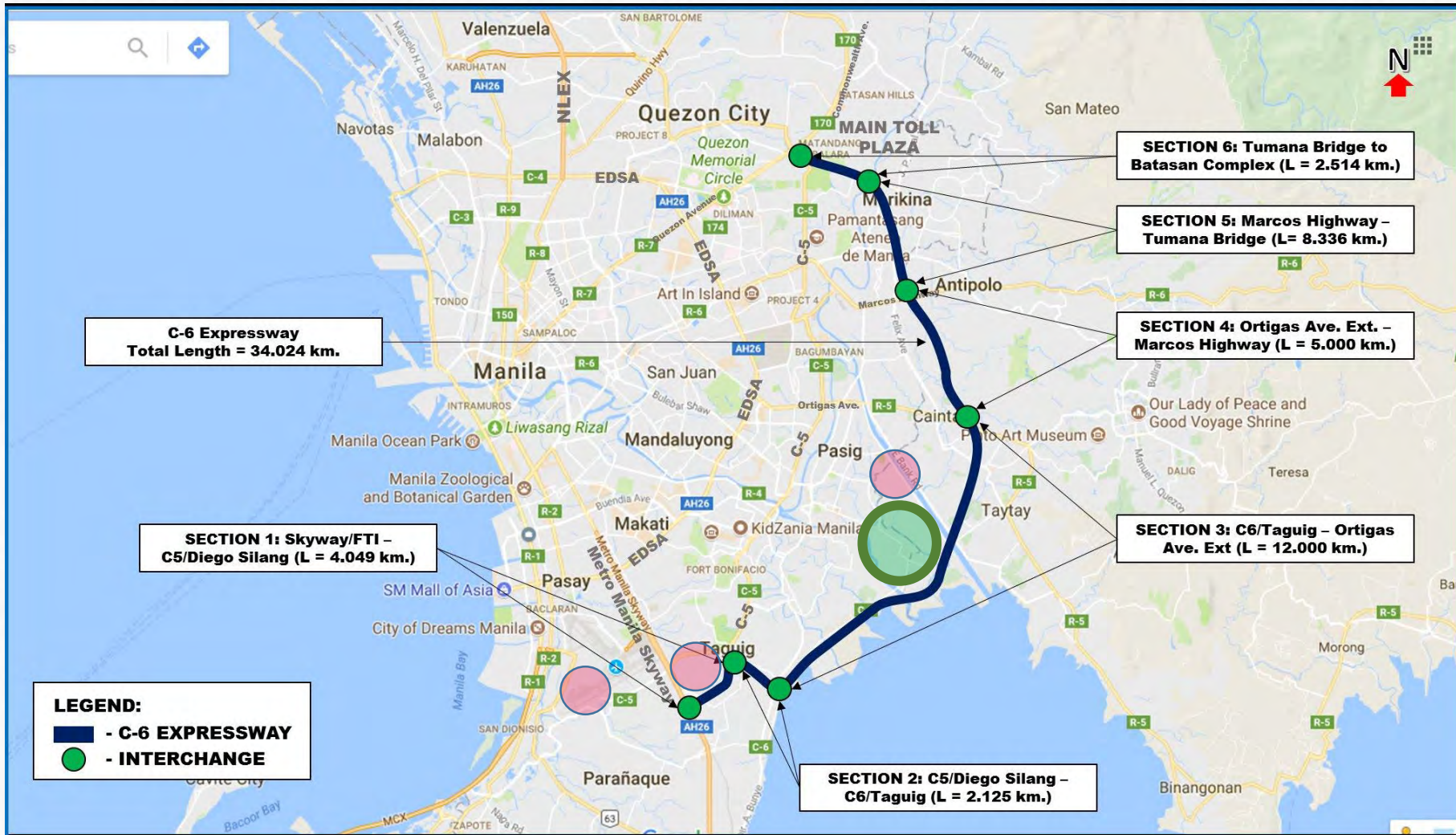
**C5 South Link**

**Start : 2<sup>nd</sup> Quarter 2017**

**Completion : 1<sup>st</sup> Quarter 2020**



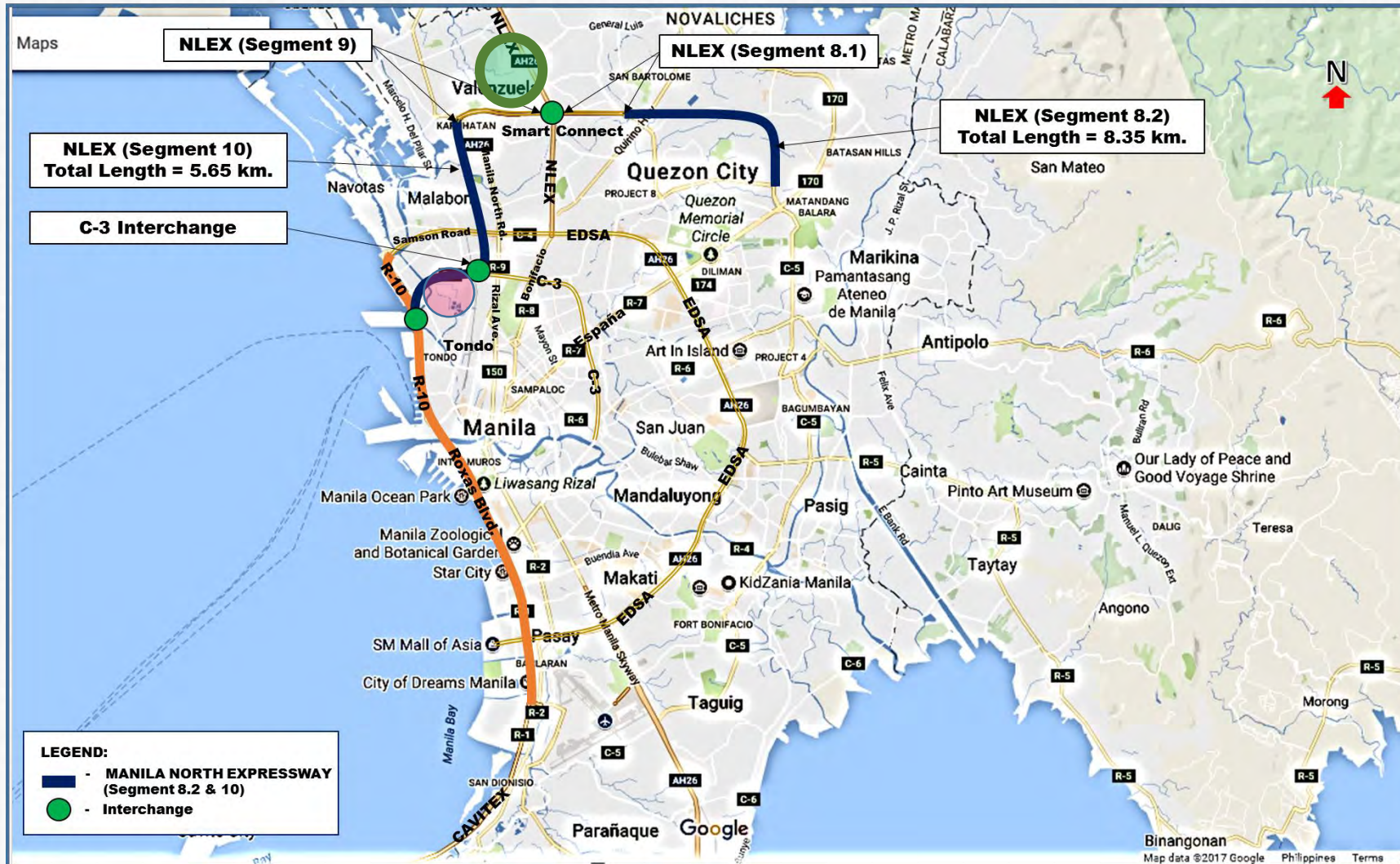
# Positioning in Key Areas in/near Greater Metro Manila



**C6 Metro Manila Expressway**  
Start : 08 January 2018  
Completion : August 2020



# Positioning in Key Areas in Greater Metro Manila



**NLEX Harbor Link**

**Start : 22 May 2014**

**Completion : 26 January 2019**



# Positioning in Key Areas in Greater Metro Manila



**NLEX – SLEX Connector**  
**Start : 22 May 2014**  
**Completion : 26 January 2019**





## PH e-Commerce Market Analysis

### Current Status of E-Commerce in the Philippines

\* A study by Google is expecting the Philippine's e-commerce market to reach **\$19 billion by 2025**

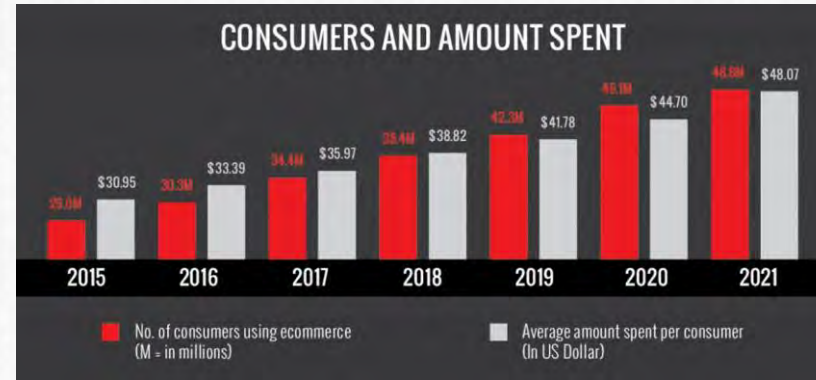
### E-COMMERCE GROWTH IN THE PHILIPPINES



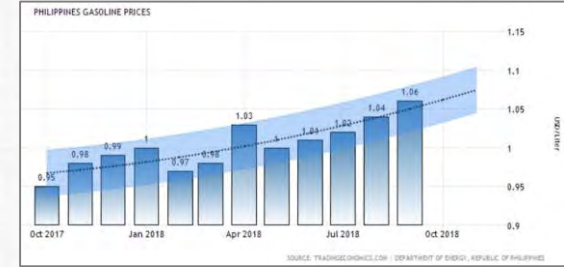
The continued increase in users and the average revenue per user are driving e-commerce growth.

50%

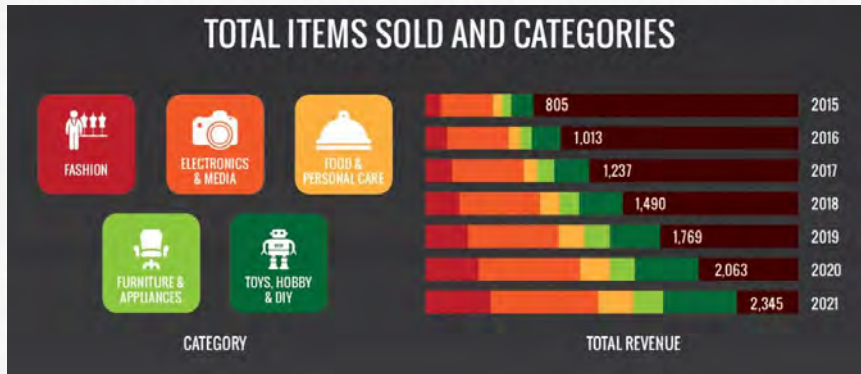
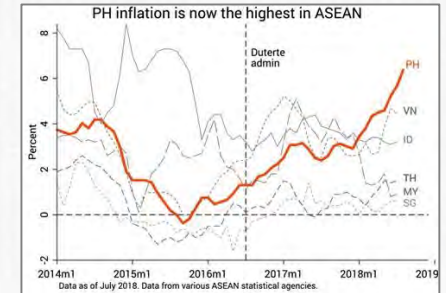
E-COMMERCE REVENUE HAS GROWN BY MORE THAN 50% FROM 2015 TO 2017, AND IS EXPECTED TO CONTINUE GROWING UNTIL 2025 AND WILL ALMOST DOUBLE BY 2021.



### 1. PH Gasoline Price increasing



### 2. PH Inflation Rate Highest in ASEAN




### Market Players

LAZADA  
COM+PH

various    Cosmetic    Supplements    Apparel

### Logistics Opportunities



- ★ Sorting Center [WH]
- ★ Last Mile Delivery
- ★ VAS and COD Management

### 3. Worsening Traffic Condition in PH



Source : \*CNN Philippines

\* Rappler.com.ph





# Investments in Key Facilities – Last Mile Delivery



## KPI Managing through GCC



## G Next System