

# **NATIONAL SHIPPING POLICY AND INTER-ISLAND SHIPPING IN INDONESIA**



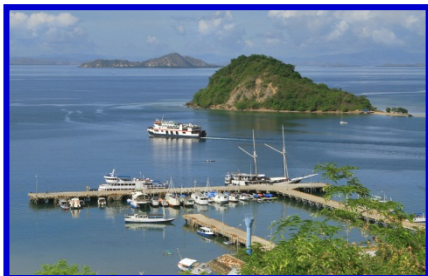
**MINISTRY OF TRANSPORTATION  
REPUBLIC OF INDONESIA**

**DIRECTORATE GENERAL OF SEA TRANSPORTATION**



# OUTLINE

- GENERAL
- PORT POLICY IN INDONESIA
- TRAFFIC NETWORK
- CARGO VOLUMES
- MAIN PORTS IN INDONESIA



# GENERAL





**AS A NATION WHICH ECONOMIC GROWTH  
IS HEAVILY DEPENDENT ON SEA**



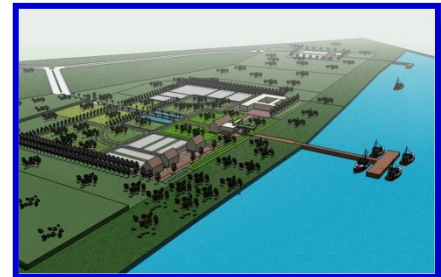
# INDONESIA



- **ONE OF THE LARGEST MARITIME COUNTRIES IN THE WORLD**
- **THE LARGEST ARCHIPELAGIC COUNTRY IN THE WORLD**
- **MALACCA & SINGAPORE STRAIT (WITH MALAYSIA & SINGAPORE)**
- **17,508 ISLANDS**
- **94.156 KM OF COASTLINE (4th AFTER KANADA, USA, & RUSIA)**
- **BETWEEN TWO CONTINENTS, ASIA AND AUSTRALIA**
- **3 ARCHIPELAGIC SEA LANES**
- **HAS ± 2400 PORT & TERMINAL**
- **IN 2011, A TOTAL OF 1 BILLION TONS WERE HANDLED AT  
INDONESIAN PORTS**



# PORT POLICY IN INDONESIA





**PORT REFORM IN INDONESIA  
(THE SHIPPING LAW  
NO. 17/2008)**



**ELEMINATION OF  
PORT OPERATION MONOPOLY**

**CREATING MORE OPPORTUNITY  
FOR PORT INVESTMENT  
(PRIVATE SECTOR, LOCAL GOVERNMENT)**

**CREATING COMPETITION  
WITHIN THE PORT AND BETWEEN PORTS**

**CLEAR SEPARATION OF  
REGULATORY AND OPERATING FUNCTION  
BY ESTABLISHMENT OF PORT AUTHORITY**

**ACCOMMODATE REGIONAL AUTONOMY**

# INDONESIAN PORT VISION 2030

EFFICIENT, COMPETITIVE AND RESPONSIVE OF PORT SYSTEM TO SUPPORT DOMESTIC AND INTERNATIONAL TRADE AND PROMOTE ECONOMIC GROWTH AND DEVELOPMENT AREA

## INDONESIAN PORT MISSION

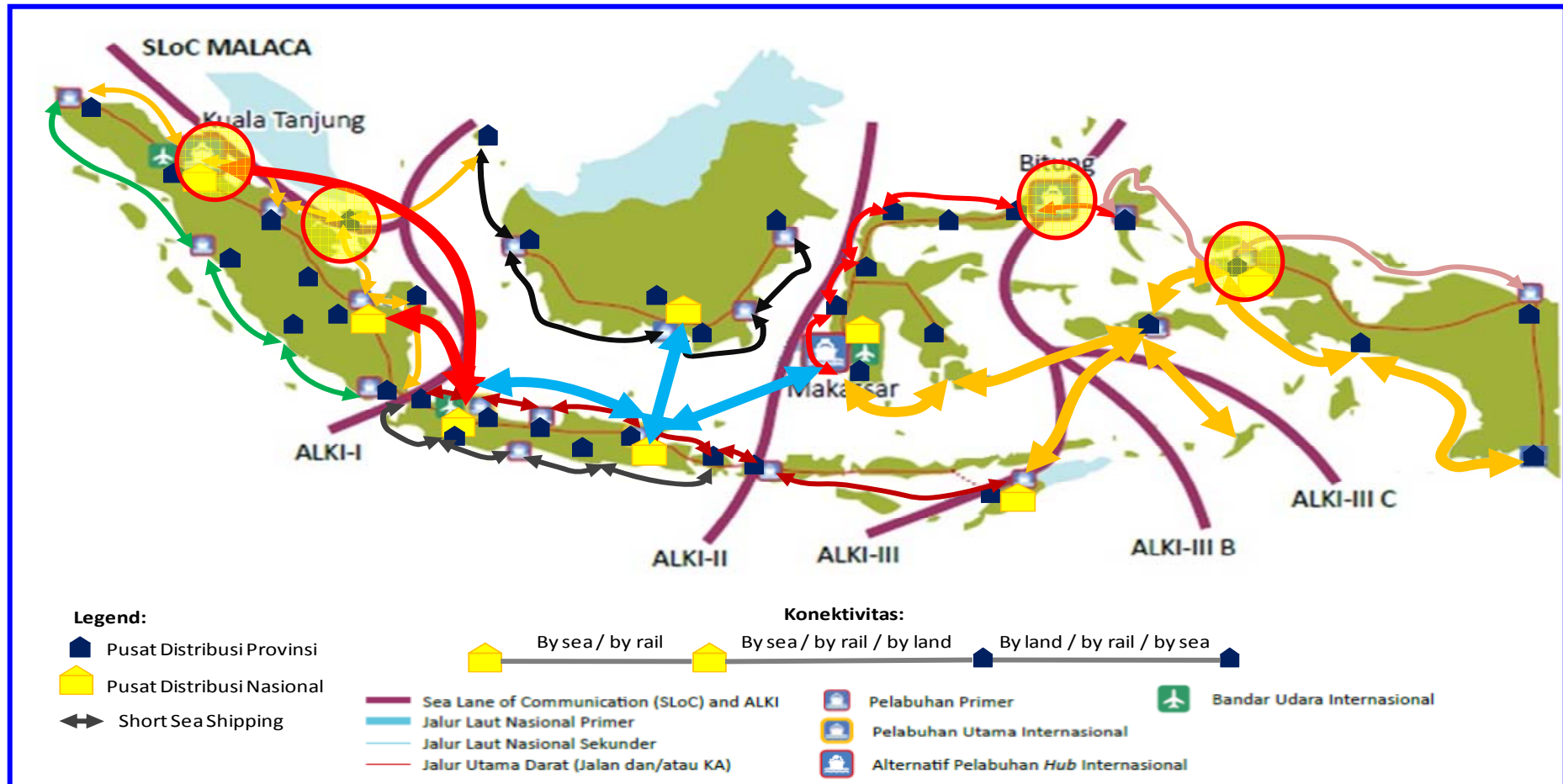
CREATING HUB INTERNATIONAL PORT

PROVIDING ACCESS TO ALL HINTERLAND MARKETS IN INDONESIA AND SUPPORT THE MAIN ECONOMIC DRIVERS

CONNECTING ALL DEVELOPED REGIONS TO LAGGING REGIONS AND ACHIEVE ECONOMIC DEVELOPMENT

PROMOTING THE EFFICIENT AND PRODUCTIVE PORT & TRANSPORT LOGISTICS

# NATIONAL CONNECTIVITY AND DISTRIBUTION



## POTENTIAL HUB PORTS :

West : Kuala Tanjung - Batam  
East : Bitung - Sorong

**ALKI to Strengthen  
National Connectivity**



**NATIONAL  
PORT  
MASTER  
PLAN**

**PORT  
MASTER  
PLAN**

**LAND AND  
WATERS  
USE PLAN  
ALLOCATION**

### NPMP IN MP3EI FRAMEWORK

**VISION OF INDONESIA – 2025**

The Self-Sufficient, Advanced, Just, and Prosperous

**MP3EI**

Accelerate Economic Transformation

**ECONOMIC CORRIDOR**

**NATIONAL CONNECTIVITY**

**NATIONAL HUMAN  
RESOURCES CAPABILITY AND  
SCIENCE - TECHNOLOGY**

**NATIONAL  
TRANSPORTATION SYSTEM  
(SISTRANAS)**

**NATIONAL LOGISTIC  
SYSTEM  
(SISLOGNAS)**

**PORT  
MASTER  
PLAN  
(PMP/RIP)**

**NATIONAL PORT  
MASTER PLAN  
(NPMP/RIPN)**

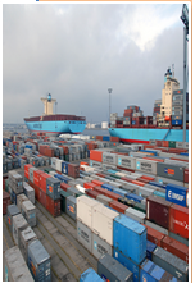
**OTHER NATIONAL  
MASTER  
PLANS/BLEUPRINT**



**TOTAL PORTS : ± 2400**



**1481 NON COMMERCIAL PORTS**  
MANAGED BY GOVERNMENT (OF WHICH, WHICH CONSIDERED COMMERCIAL, WILL BE TENDERED TO THE PRIVATE SECTOR TO MANAGED AND DEVELOPED BY PRIVATE OPERATOR)

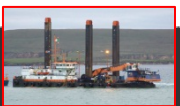
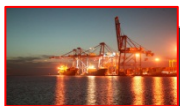


**111 COMMERCIAL PORTS**  
(INCLUDED 29 STRATEGIC PORTS)  
OPERATED BY 4 INDONESIAN PORT CORPORATION I, II, III & IV



**MORE THAN 800 SPECIAL TERMINALS/DEDICATED PRIVATE PORTS** FOR INDUSTRIES (MINNING, OIL, GAS, CHEMICAL)

# INDONESIAN PORT STRUCTURE



# INDONESIAN PORT HIERARCHY

## ± 30 MAIN PORTS

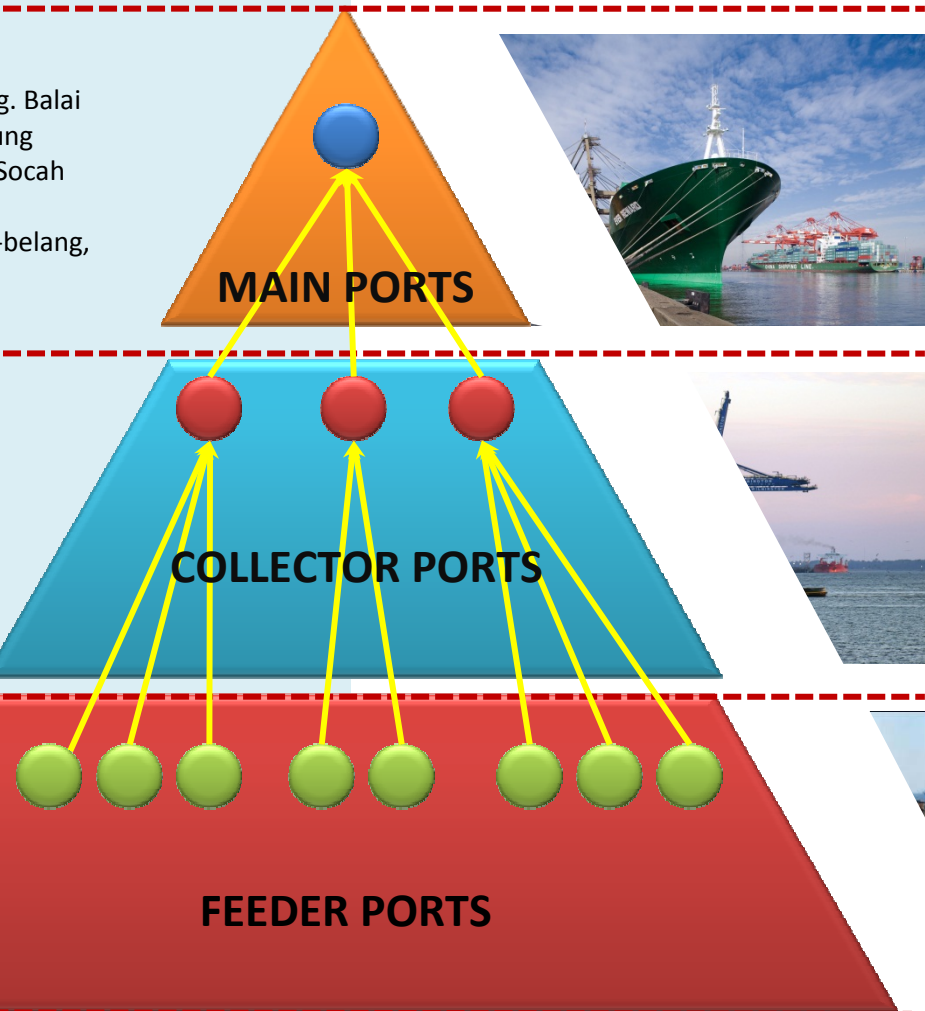
Sabang, Belawan, Kuala Tanjung, Dumai, Batam (3 terminal), Tg. Sauh, Tg. Balai Karimun, Teluk Bayur, Palembang, Panjang, Banten, Tg. Priok, Ujung Jabung Cilamaya, Cilacap, Semarang, Tanjung Perak, Tg. Buluhpandan, Benoa, Soeh Probolinggo, Teluk Lamong, Pontianak, Sampit, Banjarmasin, Kuala Enok Mekar Putih/Kotabaru, Celukan Bawang, Tanah Ampo, Tg. Dewa, Belang-belang, Kupang, Celukan, Balikpapan, Bitung, Makassar, Ternate, Ambon, Sorong, Seget, Jayapura

## ± 300 COLLECTOR PORTS, such as :

Malahayati, Tg. Balai Asahan, Selat Panjang, Bengkalis, Tg. Buton Pekanbaru, Tg. Batu, Tg. Pinang, Jambi, Pangkal Balam, Tg. Pandan, Bojonegara, Sunda Kelapa, Kep. Seribu, Tegal. Batang, Gresik, Sampang, Bima, Kumai, Pelabuhan, Garongkong, Luwuk, Tangkiang, Nunukan, Tarakan, Samarinda, Maloy, Manado, Banggai, Bau-bau, Waingapu, Ende, Manado, Pare-Pare, Kendari, Biak, Manokwari, Fak-Fak

## ± 1.300 FEEDER PORTS, such as :

Susoh, Idi, Air Bangis, Serasan, Nipah Panjang, Malakoni, Bagan Siapi-Api, Toboali, Karang Agung, Teluk Betung, Brebes, Jepara, Tuban, Tuban, Buleleng, Sape, Reo, Lirung, Lawele, Jailolo, Sanana, Serui

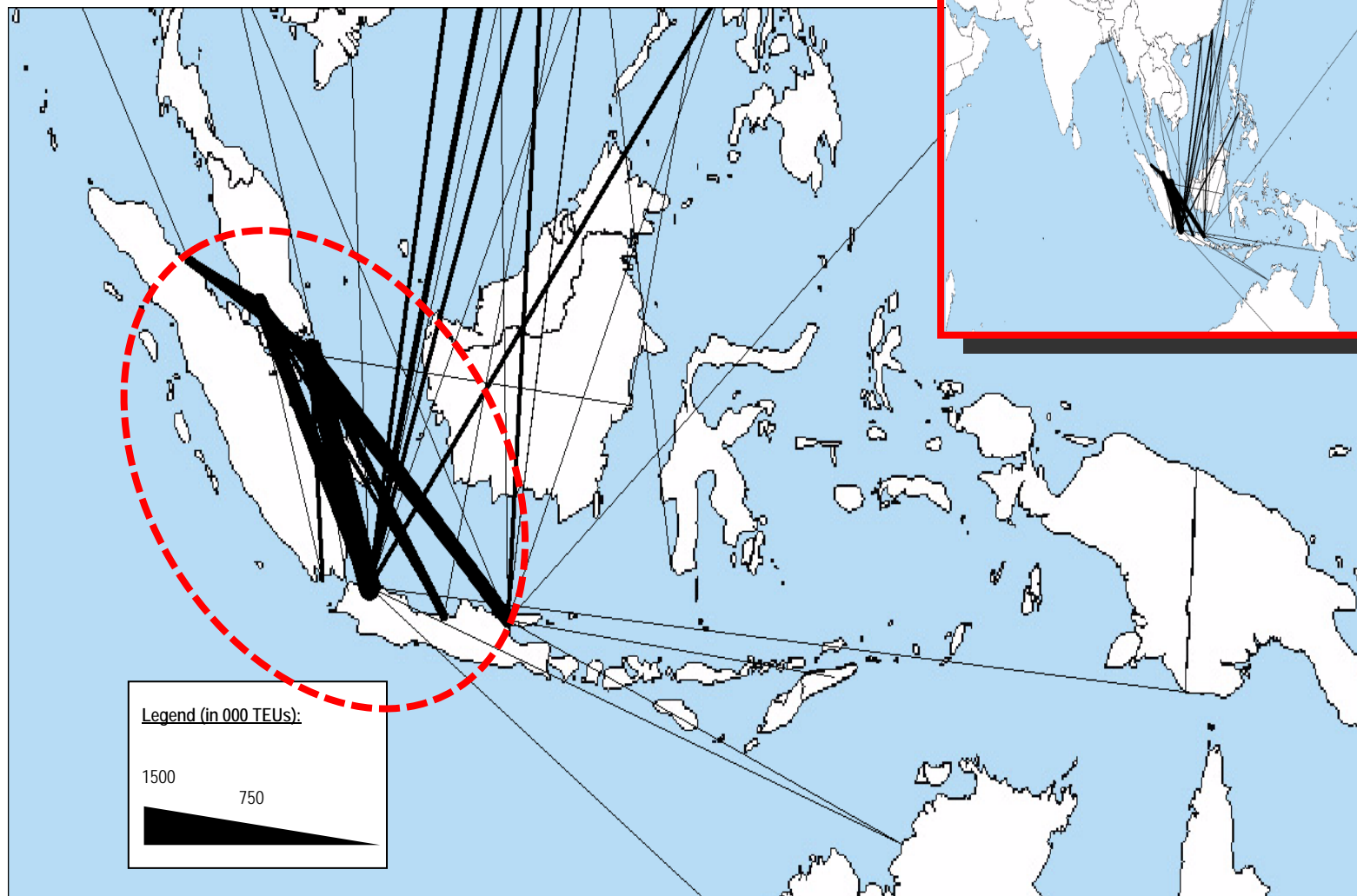
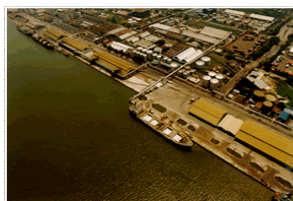


# TRAFFIC NETWORK



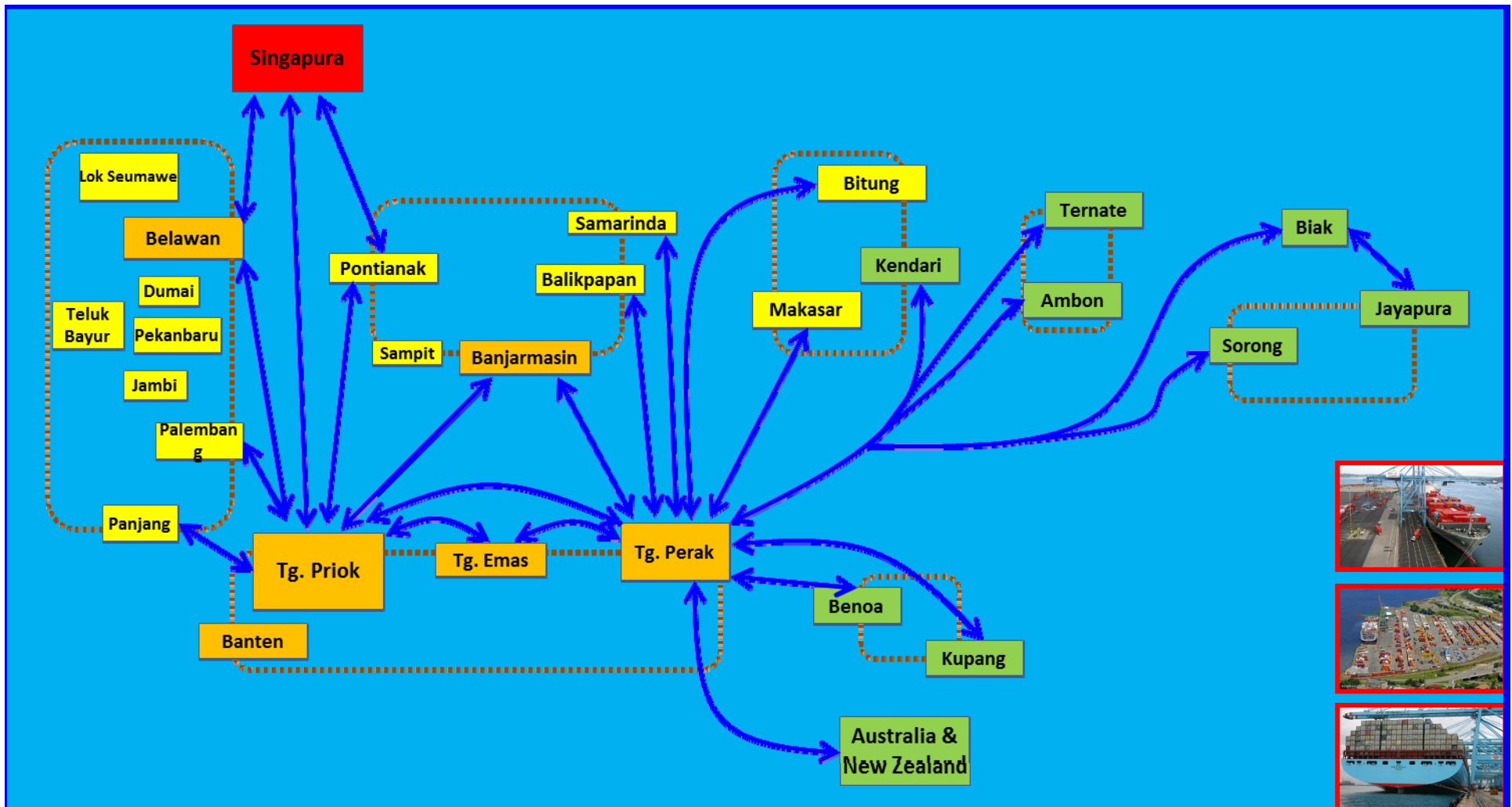


# MAJOR INTERNATIONAL TRADE FLOWS FOR CONTAINER TRAFFIC - 2009

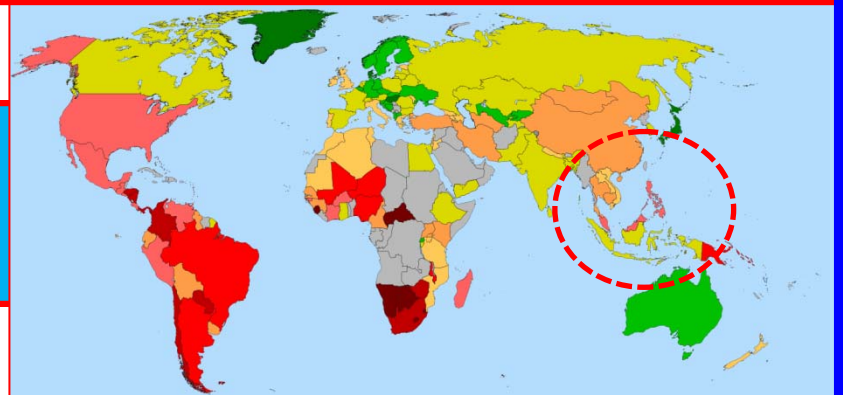


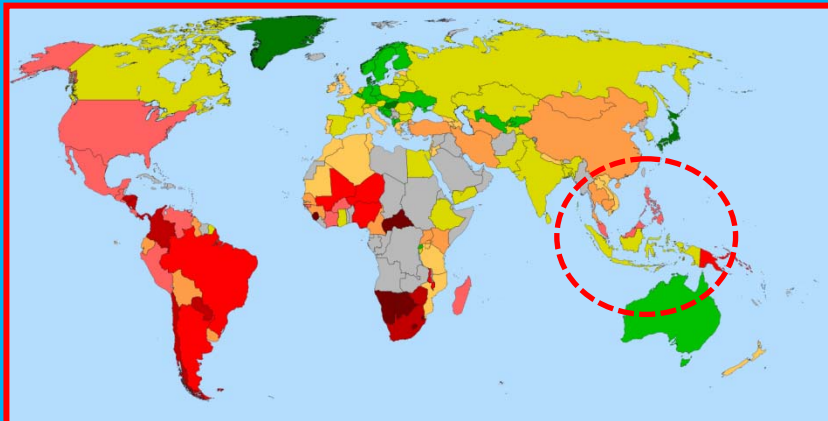
# DOMESTIC TRADE FLOWS FOR CONTAINER TRAFFIC



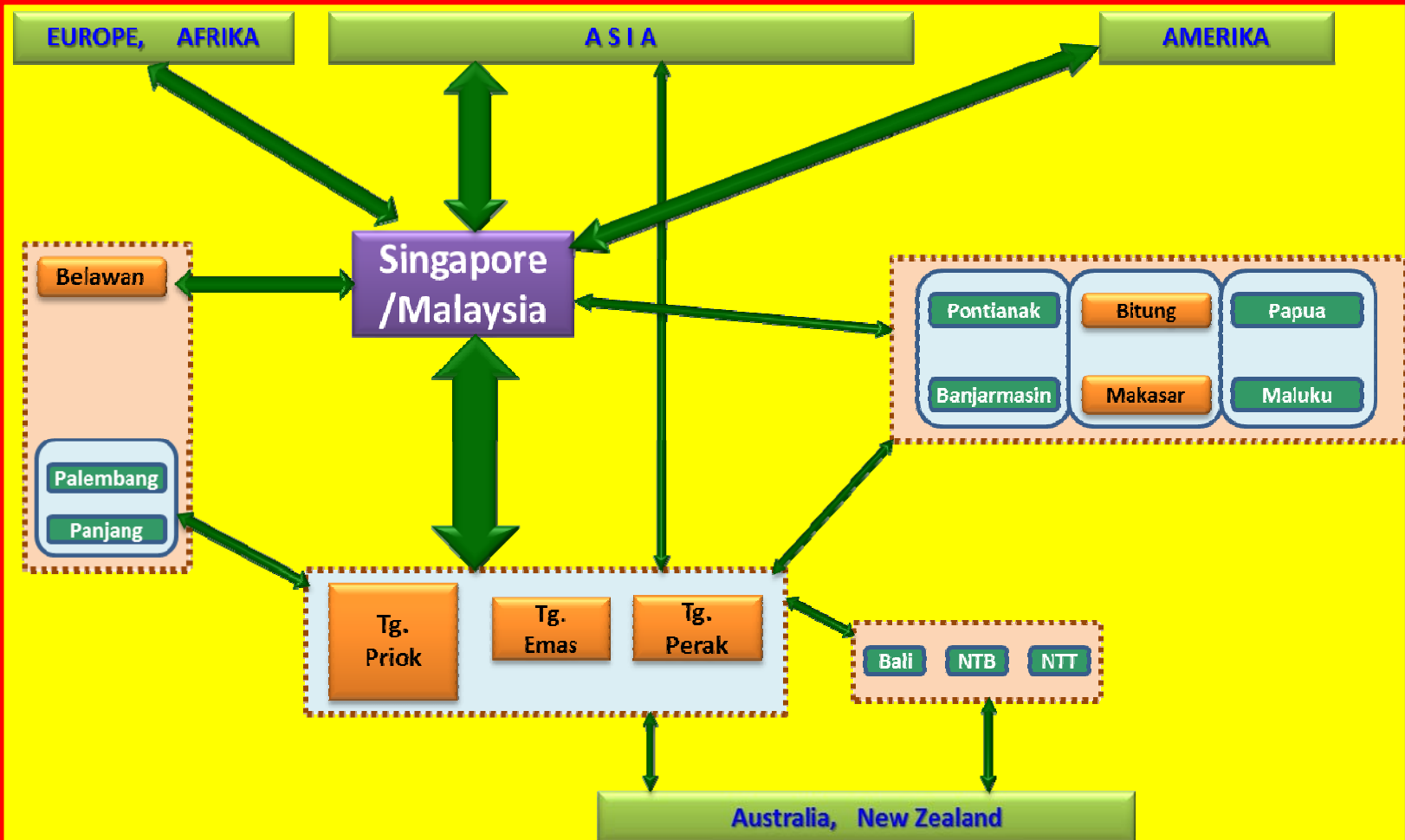


## EXISTING NETWORK OF CONVENTIONAL CARGO





# EXISTING PATTERN : EXPORT-IMPORT OF CONTAINERIZED CARGO





# INTER ISLAND DOMESTIC SHIPPING LINER SERVICES (JAKARTA OUTLET)

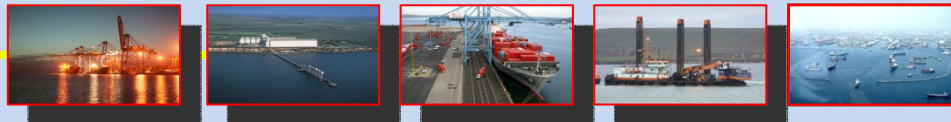
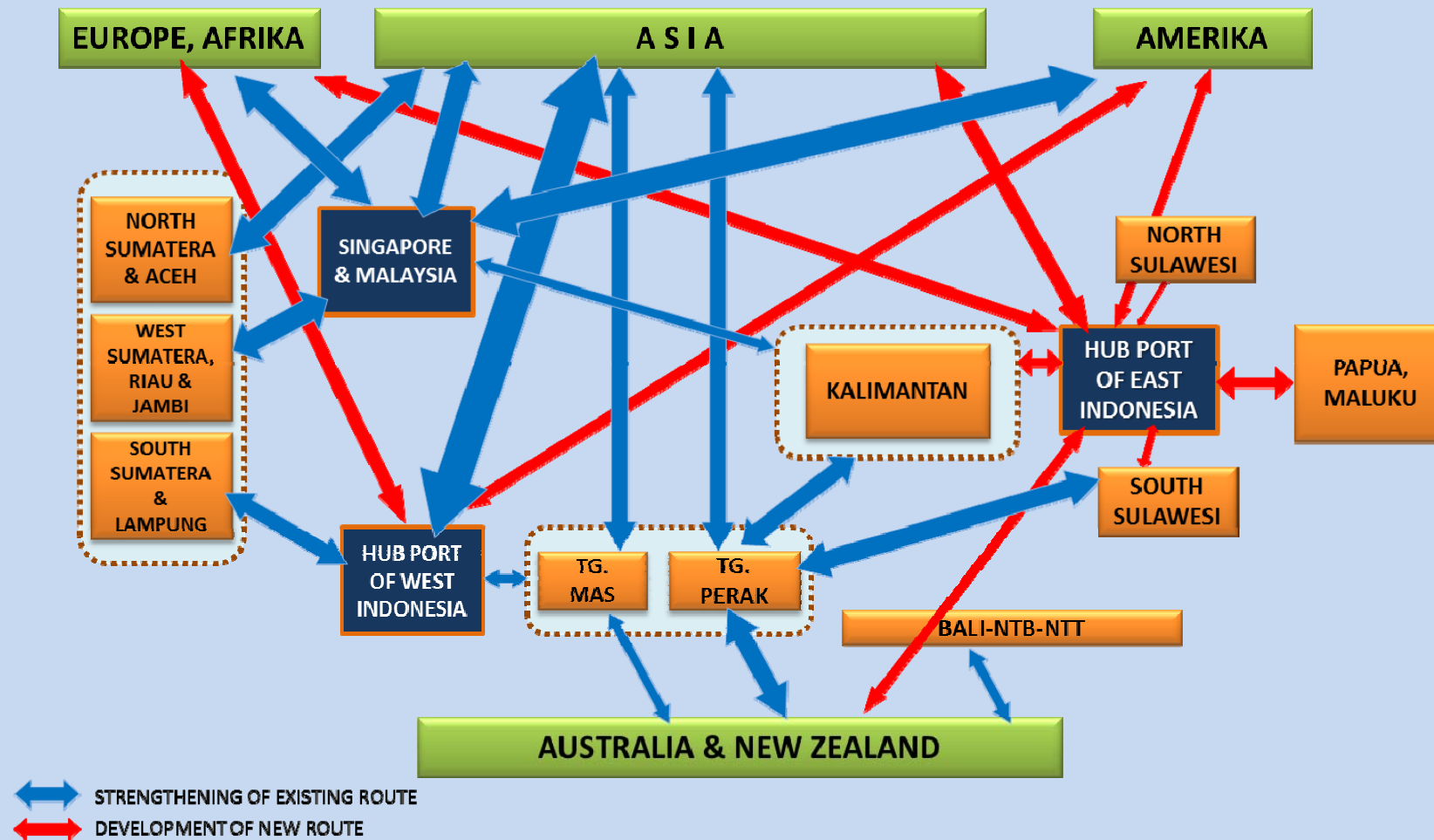




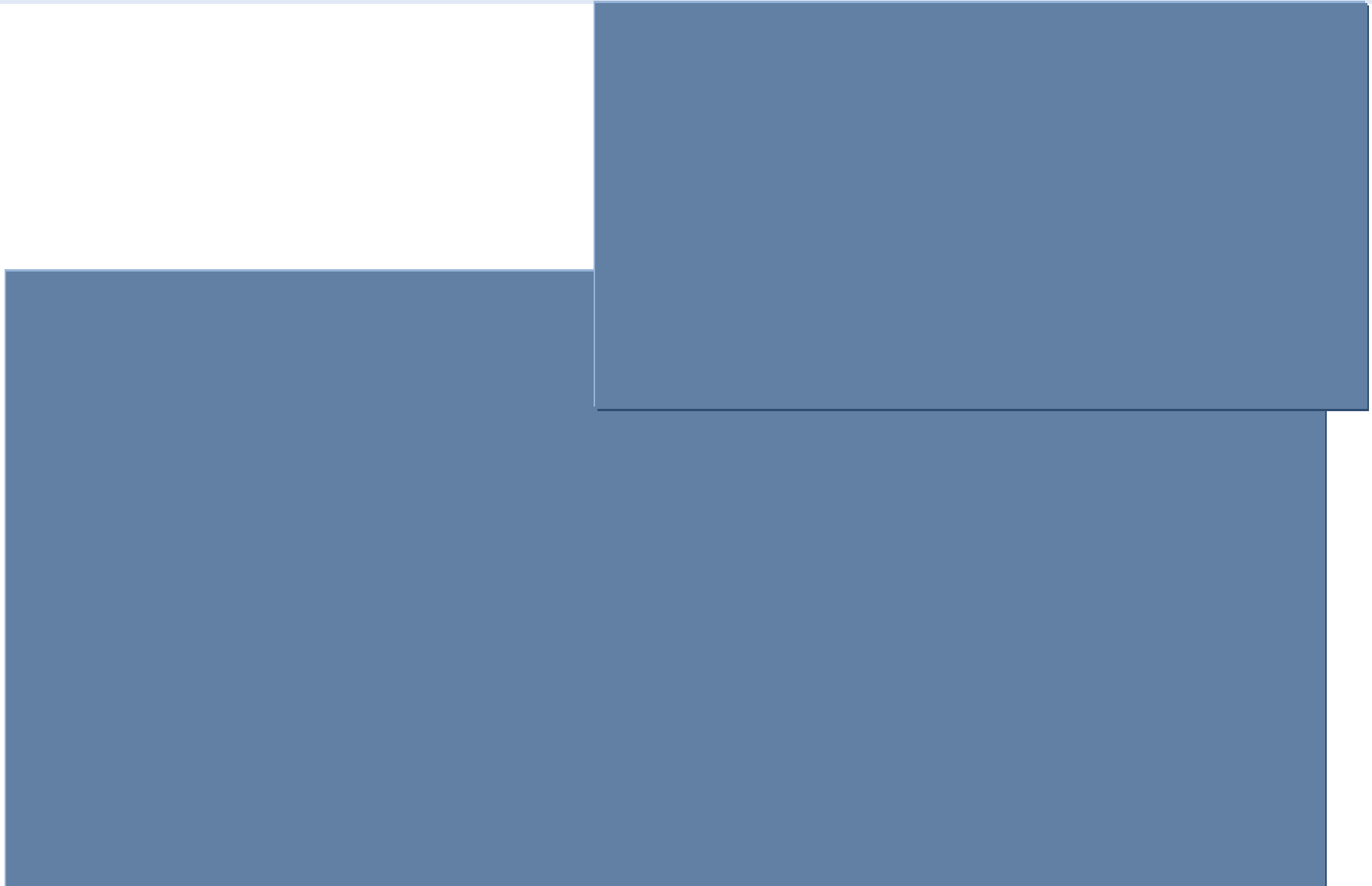
# INTER ISLAND DOMESTIC SHIPPING LINER SERVICES (SURABAYA OUTLET)



# FUTURE OF LOGISTIC ROUTE : EXPORT-IMPORT CONTAINERIZED CARGO OF INDONESIA

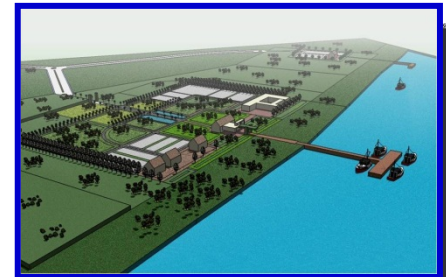


**FUTURE OF LOGISTIC ROUTE :**  
**INDONESIA MAIN SEA CORRIDOR WEST-EAST PEDULUM**  
**(PENDULUM NUSANTARA) UNDER REVIEW**



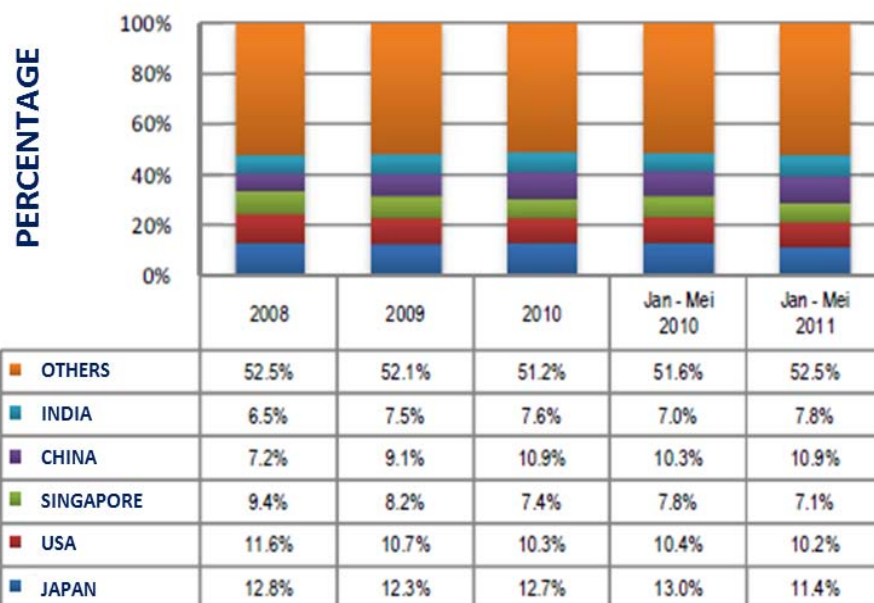


# CARGO VOLUMES



# EXPORT DESTINATION - 2011

## MAIN COUNTRY OF THE EXPORT



NO	COUNTRY	2009	2010	2011	Trend
1	USA	9.377.063.502	12.188.787.122	14.479.975.202	7,64%
2	JAPAN	7.034.537.989	10.020.127.349	12.577.409.967	6,16%
3	OTHERS	7.017.914.734	8.679.833.023	11.270.635.350	9,62%
4	CHINA	6.002.223.039	8.046.780.413	10.877.243.780	17,61%
5	SINGAPORE	7.594.369.632	9.095.966.266	10.717.964.544	3,61%
6	INDIA	4.639.704.813	6.331.123.790	7.426.973.630	18,60%
7	MALAYSIA	4.318.161.359	5.981.207.888	7.063.495.112	15,41%
8	NETHERLANDS	2.636.784.879	3.375.662.049	4.736.755.397	11,62%
9	THAILAND	1.973.942.096	3.249.159.611	4.220.699.350	16,57%
10	SOUTH KOREA	2.244.623.243	3.168.599.856	3.719.593.368	13,35%
11	AUSTRALIA	1.671.693.481	2.308.840.679	3.008.692.682	12,06%
12	GERMANY	2.061.184.835	2.564.850.913	2.996.874.091	8,77%
13	ITALY	1.201.698.963	1.732.127.395	2.419.036.445	22,05%
14	PHILIPPINES	1.423.391.439	2.065.293.782	2.337.980.443	21,16%
15	HONGKONG	1.308.326.261	1.756.890.792	2.152.173.668	15,39%
16	VIETNAM	1.332.837.075	1.732.839.319	1.970.227.759	10,32%
17	SPAIN	769.553.071	1.141.461.601	1.710.609.687	24,03%
18	TAIWAN	997.013.000	1.421.096.050	1.705.339.699	5,82%
19	BRAZIL	779.613.564	1.428.876.827	1.689.637.430	24,61%
20	UEA	1.226.258.329	1.450.718.427	1.651.460.648	3,53%
21	ENGLAND	1.284.207.542	1.577.397.420	1.607.049.561	5,47%
22	SAUDI ARABIA	950.089.712	1.152.935.838	1.419.701.355	8,36%
23	SOUTH AFRICA	471.801.957	669.904.521	1.400.827.113	22,42%
24	TURKEY	674.121.994	1.033.487.934	1.370.128.543	7,51%
25	EGYPT	669.719.044	820.617.572	1.365.213.548	19,94%
26	BANGLADESH	767.122.294	967.459.805	1.315.468.438	18,21%
27	BELGIA	946.428.185	1.105.222.607	1.262.037.260	-0,01%
28	FRANCE	828.860.039	1.081.077.054	1.238.499.618	11,68%
29	CANADA	483.693.768	701.071.275	909.451.804	13,51%
30	RUSSIA	248.180.106	543.221.104	800.130.887	28,13%
31	IRAN	500.720.932	622.438.134	767.440.771	9,20%

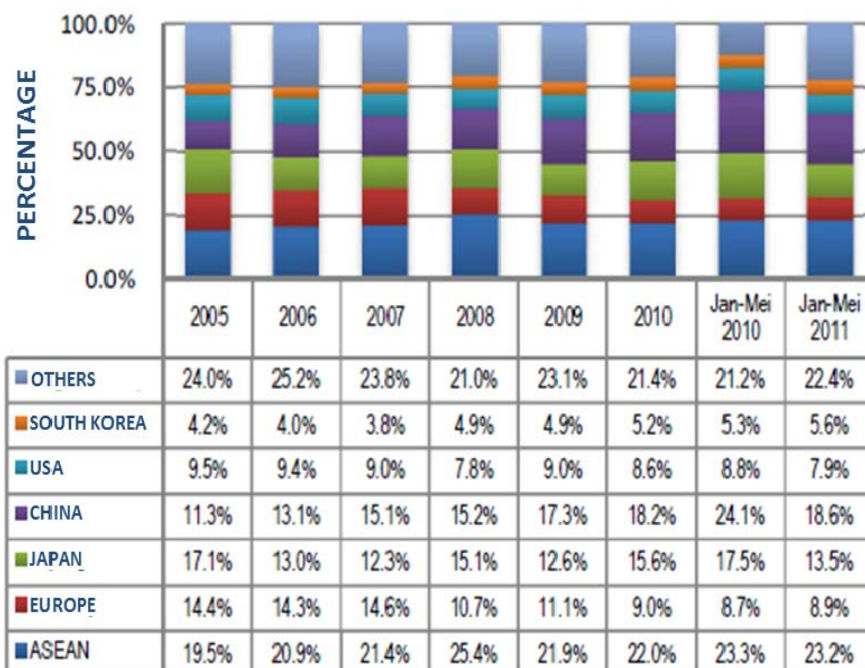


Source : Central Bureau of Statistics

Unit : Thousand US\$

# IMPORT ORIGIN 2011

MAIN COUNTRY OF THE IMPORT



NO	COUNTRY	2009	2010	2011	Trend
1	CHINA	12.739.070.057	18.722.124.134	24.333.313.948	30,79%
2	JAPAN	9.759.801.103	16.842.531.731	19.233.696.123	26,09%
3	SINGAPORE	9.203.462.323	10.005.939.924	10.495.257.685	20,95%
4	USA	5.928.429.531	7.898.873.689	8.391.843.959	21,76%
5	THAILAND	4.333.927.884	7.221.136.816	9.936.536.489	22,11%
6	SOUTH KOREA	3.791.564.805	5.579.318.602	7.424.084.805	32,20%
7	MALAYSIA	3.088.906.091	4.380.103.587	5.508.756.224	22,70%
8	GERMANY	2.337.177.573	2.951.354.453	3.332.521.229	11,08%
9	TAIWAN	1.992.078.760	2.929.860.486	3.824.344.997	22,76%
10	AUSTRALIA	2.035.963.183	2.435.375.554	3.065.736.160	6,94%
11	INDIA	1.852.563.659	2.299.512.633	3.134.666.224	17,47%
12	HONGKONG	1.692.263.083	1.852.931.186	2.457.335.474	37,90%
13	FRANCE	1.612.597.753	1.304.908.593	1.949.829.973	4,00%
14	BRAZIL	801.369.264	1.196.205.261	1.303.078.251	22,88%
15	VIETNAM	417.783.921	1.022.011.784	2.186.279.445	43,29%
16	ENGLAND	836.641.323	931.377.124	1.160.965.430	11,15%
17	ITALY	715.598.177	894.454.602	1.198.338.024	11,76%
18	RUSSIA	369.680.137	885.476.830	1.264.431.576	21,88%
19	KANADA	613.787.918	833.856.413	1.532.837.553	13,30%
20	SAUDI ARABIA	457.000.795	733.847.622	947.563.062	24,34%
21	SWEDEN	710.533.327	712.315.121	865.518.912	-1,30%
22	NEW ZEALAND	544.479.942	710.668.403	706.169.607	8,13%
23	PHILIPPINES	530.256.274	694.527.411	820.449.477	18,60%
24	ARGENTINA	616.481.159	690.550.366	1.120.659.510	28,75%
25	NETHERLANDS	537.928.940	631.925.893	790.288.947	10,75%
26	UKRAINE	378.163.092	585.098.366	683.232.725	0,39%
27	BELGIUM	427.061.794	544.373.802	581.098.910	10,35%
28	SOUTH AFRICA	257.336.222	472.936.734	651.347.084	33,75%
29	SWISS	434.981.047	460.268.993	615.201.485	10,26%
30	FINLAND	227.036.222	358.711.902	500.090.861	8,85%
31	OTHERS	3.154.162.585	4.332.828.541	6.084.075.811	26,05%



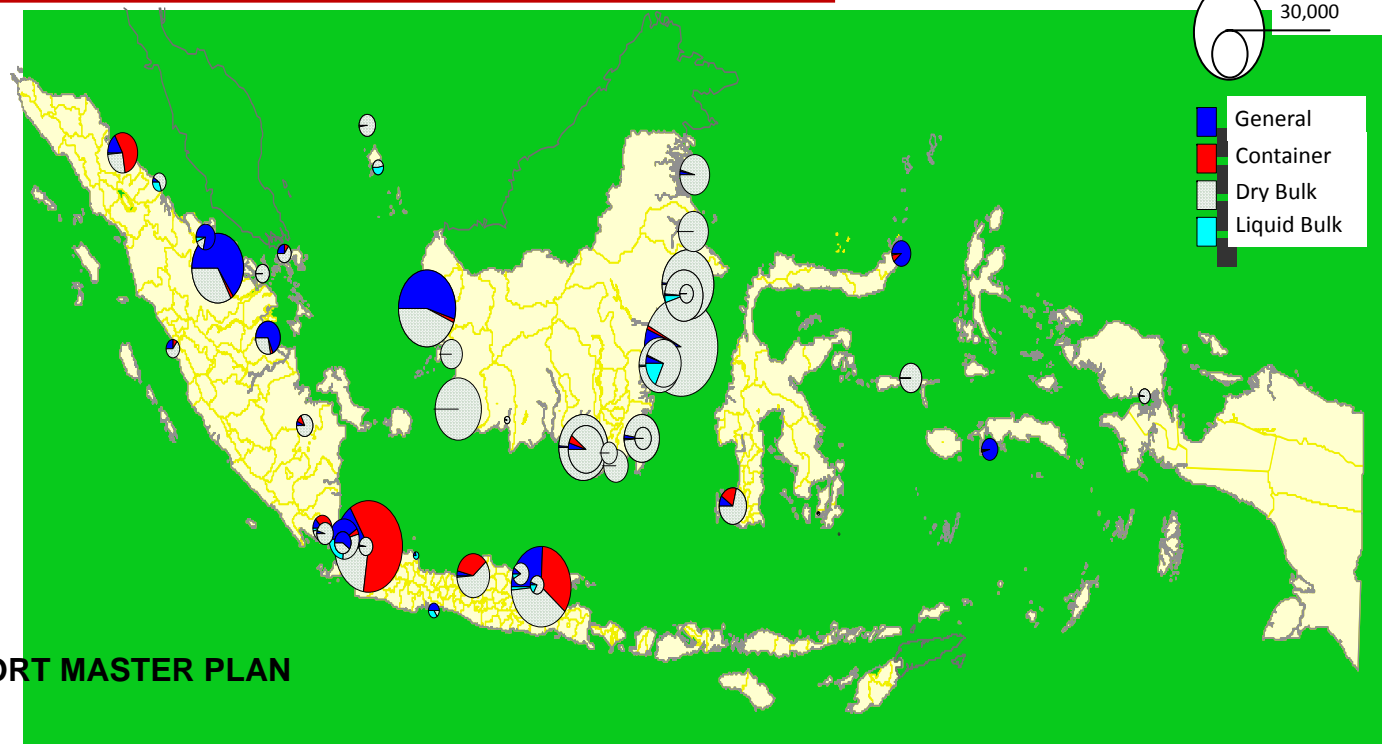
Source : Central Bureau of Statistics

Unit : Thousand US\$



# INDONESIAN PORT HANDLED

TYPE OF CARGO	YEAR	
	2009 (Million Ton)	2030 (Million Ton)
<b>TOTAL</b>	<b>968.4</b>	<b>2114.2</b>
<b>DRY BULK</b>	<b>560.6 (57,9 %)</b> 75% Coal	<b>960.2</b>
<b>LIQUID</b>	<b>176.1 (18,2%)</b> 86 % Petroleum & CPO	<b>413.2</b>
<b>GENERAL CARGO</b>	<b>143.7 (14,8%)</b>	<b>293.2</b>
<b>CONTAINER CARGO</b>	<b>88.2 (9,1%)</b>	<b>477.7</b>

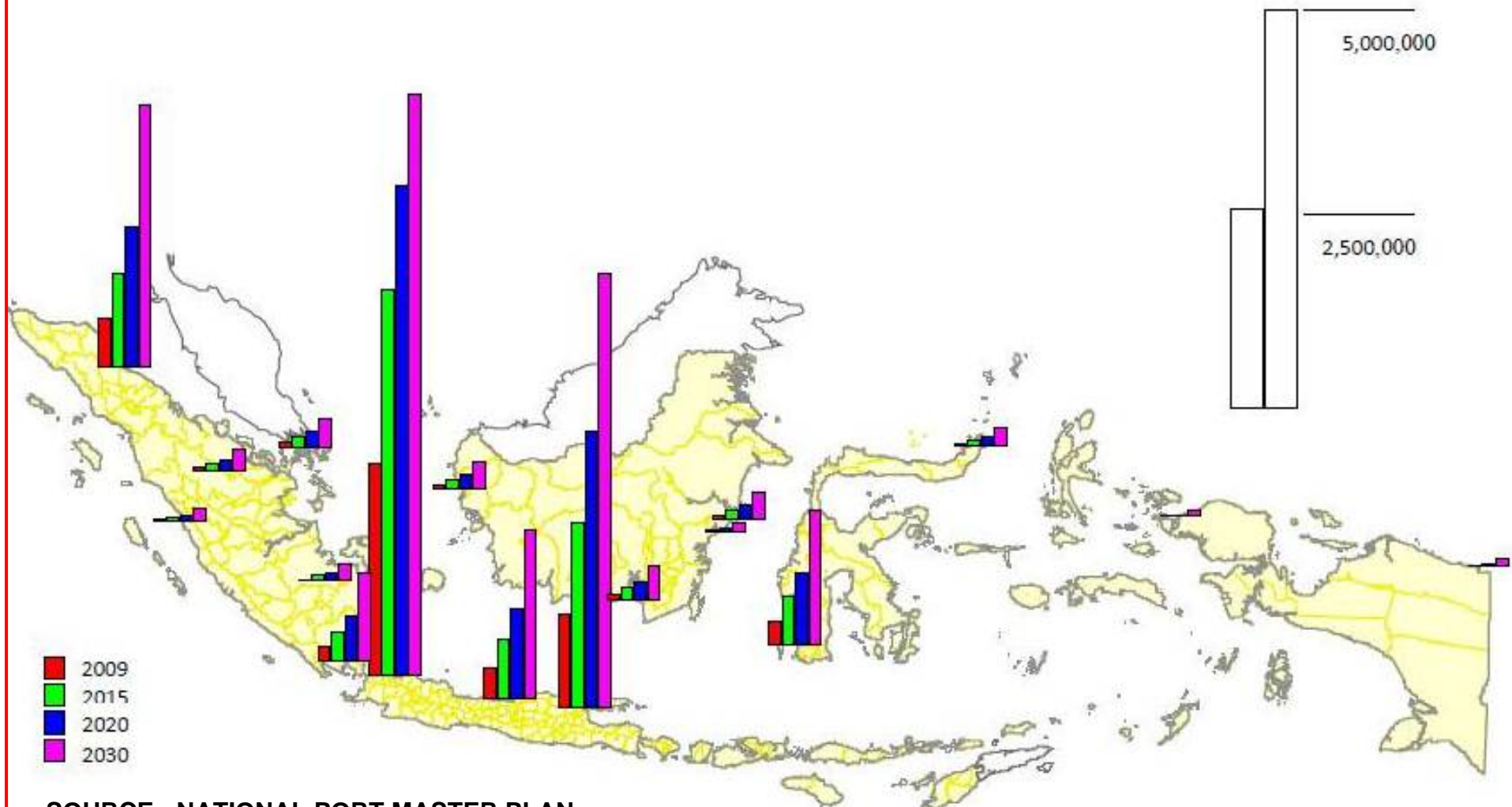


SOURCE : NATIONAL PORT MASTER PLAN



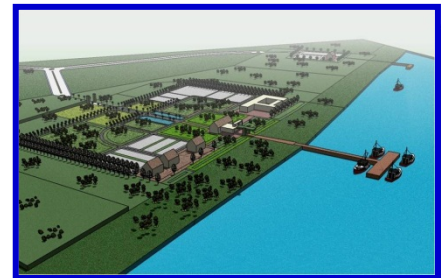
# INDONESIA CONTAINER CARGO

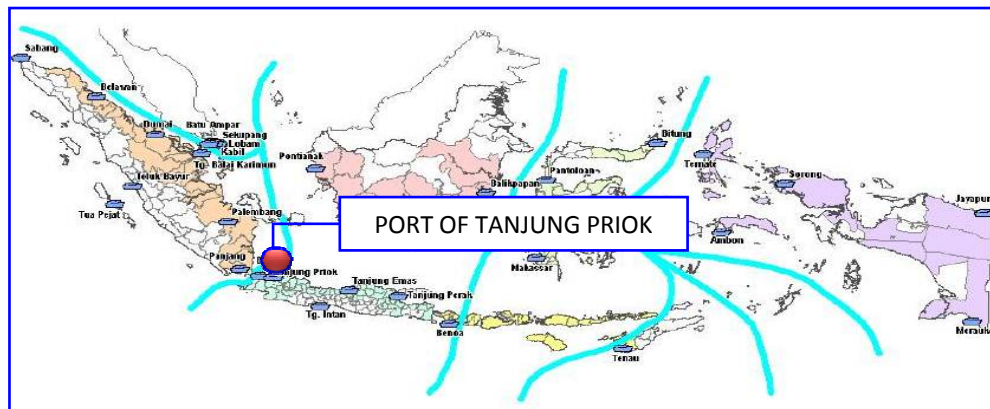
	DOMESTIC (TEUs)	INTERNATIONAL (TEUs)	TOTAL (TEUs)
2009	2.772.205	6.199.333	8.971.538
2030	18.344.644	29.423.403	47.768.047



SOURCE : NATIONAL PORT MASTER PLAN

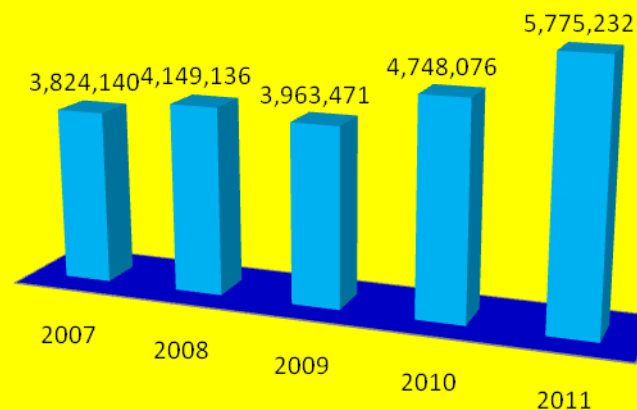
# MAIN PORTS IN INDONESIA





## PORT OF TANJUNG PRIOK

CONTAINER HANDLING STATISTIC  
IN PORT OF TANJUNG PRIOK

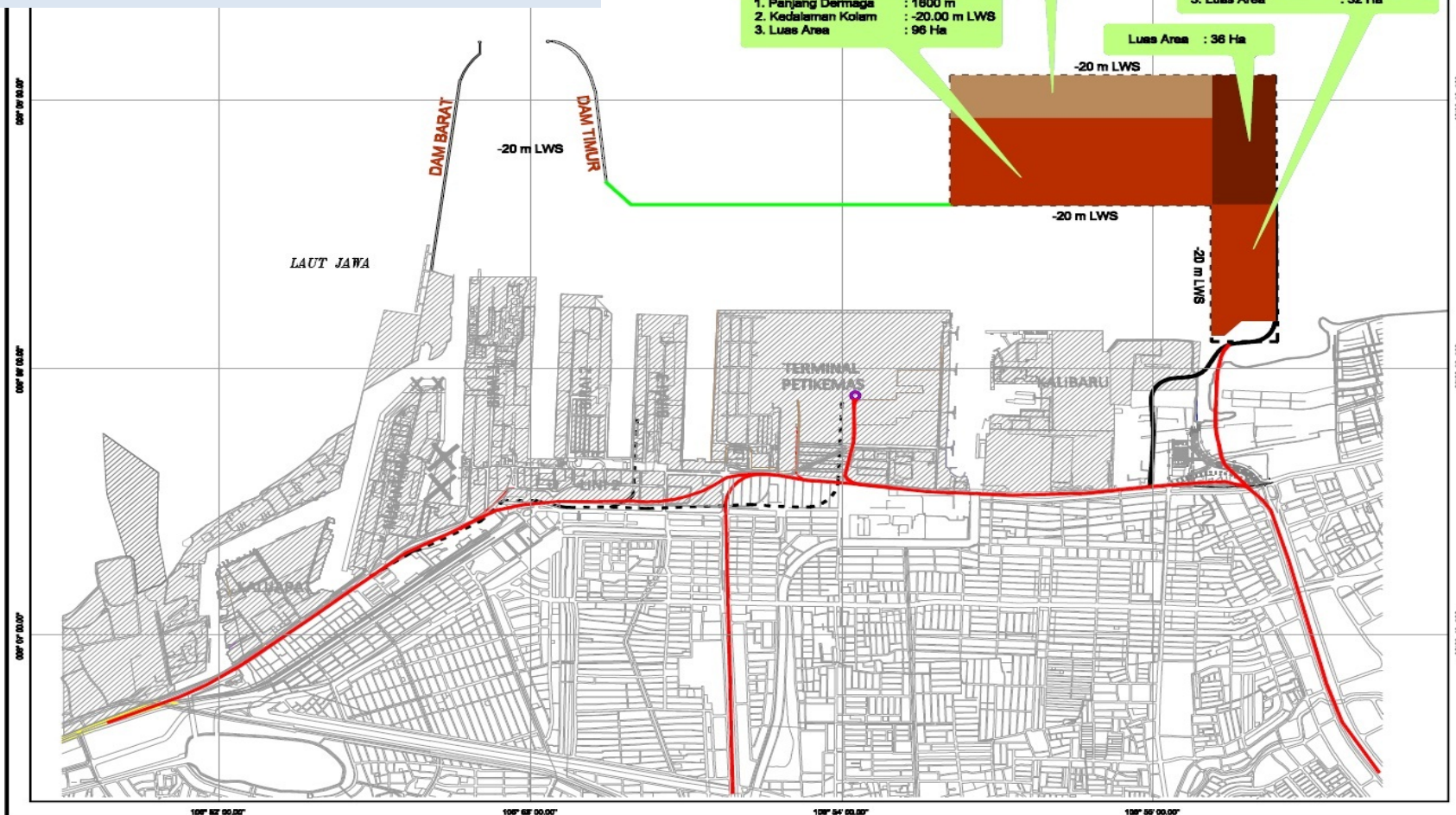


NO	WHARF	LENGHT M	AREA M <sup>2</sup>	DEPTH M LWS	FACILITY	NO.	FACILITY	TOTAL UNIT
1	Pelabuhan Nusantara I	1.448	29.157	-4.00 s/d -9.00		<b>1 HANDLING FACILITY</b>		
2	Pelabuhan Nusantara II	619	11.712	-5.00 s/d -6.00		a.	Excavator	11
3	Nusantara II Timur	725	12.026	-2.60 s/d -10.00		b.	Reach Stacker	64
4	Pelabuhan I Barat	1.346	32.127	-6.50 s/d -10.00		c.	Shore Crane	7
5	Pelabuhan I Selatan	175	4.886	-7.00		d.	Forklift	138
6	Pelabuhan I Timur	1.150	23.938	-6.50 s/d -9.00		e.	Mobile Crane	1
7	Pelabuhan I Utara	393	8.310	-5.00 s/d -13.40		f.	Top Loader	7
8	Pelabuhan II Barat	1.023	18.249	-7.70 s/d -10.00		g.	HMC	14
9	Pelabuhan II Selatan	144	2.880	-4.00 s/d -6.00		h.	QCC	32
10	Pelabuhan II Timur	1.035	17.797	-8.60 s/d -10.00		i.	RTGC	113
11	Pelabuhan II Utara	298	7.450	-11.00 s/d -12.00		j.	RMGC	5
12	Pelabuhan III Barat	1.041	14.048	-10.00 s/d -12.00		k.	Side Loader	7
13	Pelabuhan III Timur (JICT)	914	22.855	-10.20 s/d -11.70		l.	Head Truck	212
14	JICT, Koja, Bogasari, DKP, Car Terminal	2.257	73.522	-7.40 s/d -14.00		m.	Chassis	212
<b>TOTAL WHARF</b>		<b>12.568</b>	<b>278.957</b>			<b>2 SHIP</b>		
						a.	Tugboat	16
						b.	Scout Ship	9
						c.	Kepil	7



# Development of North Kalibaru Terminal

- CT : 900 x 400 m<sup>2</sup> (deck on pile) and 2.000 x 900 m<sup>2</sup> (reserve area : 400 x 900 m<sup>2</sup> and container yard : 1600 x 850 m<sup>2</sup>)
- Additional capacity : 4,5 M TEUs
- Depth : - 16 m LWS





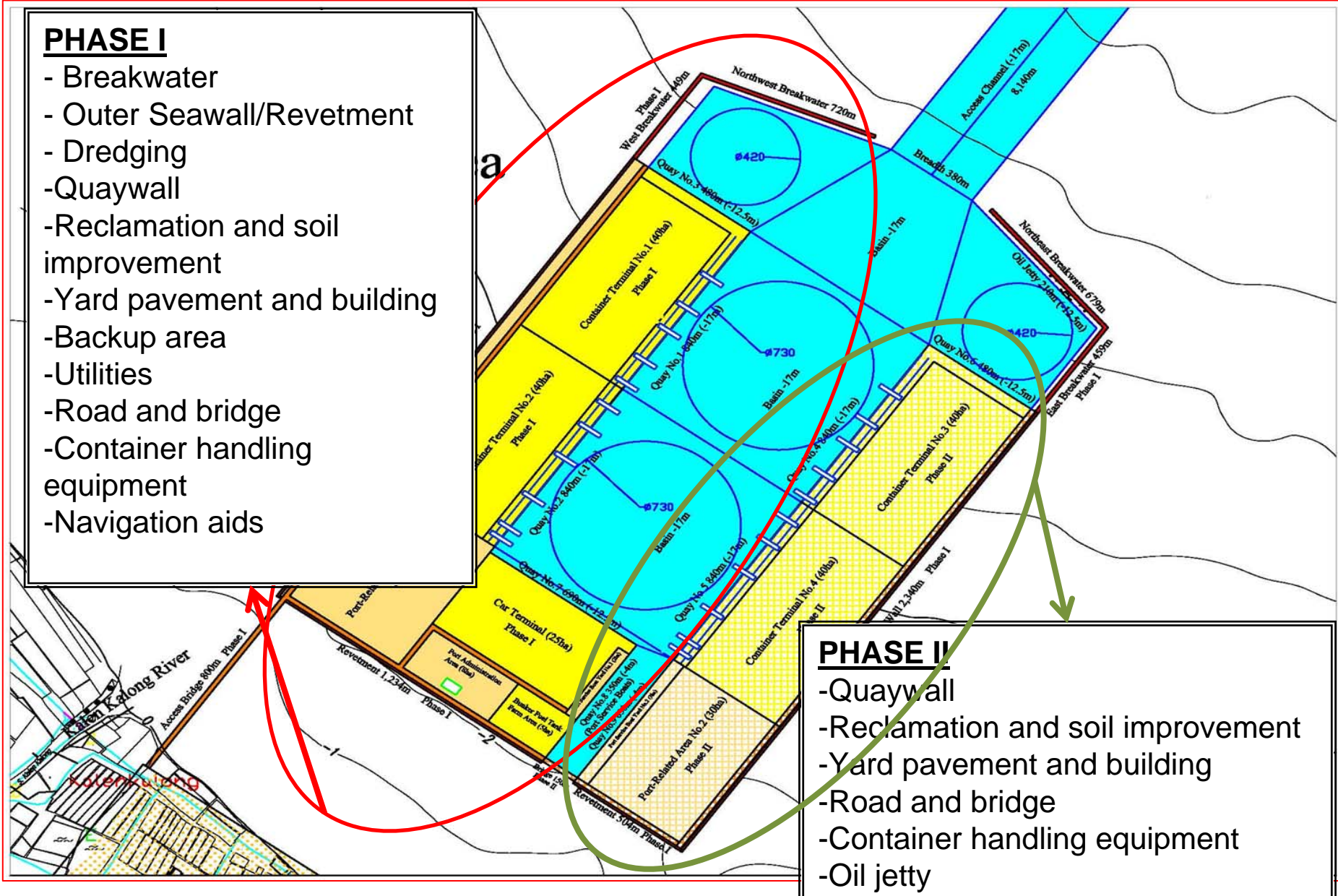
# CILAMAYA NEW PORT DEVELOPMENT



# CILAMAYA NEW PORT DEVELOPMENT PLAN

## PHASE I

- Breakwater
- Outer Seawall/Revetment
- Dredging
- Quaywall
- Reclamation and soil improvement
- Yard pavement and building
- Backup area
- Utilities
- Road and bridge
- Container handling equipment
- Navigation aids

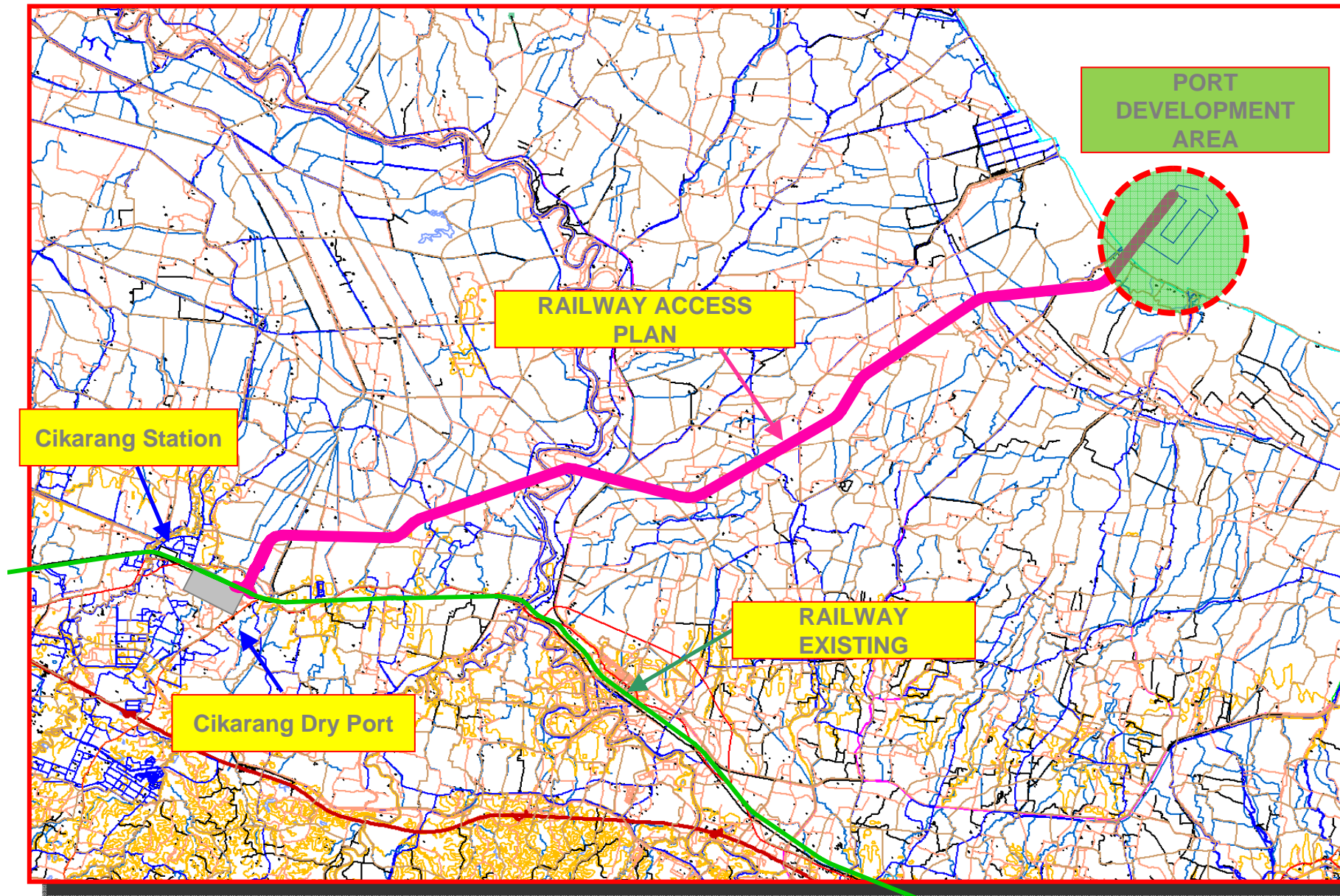


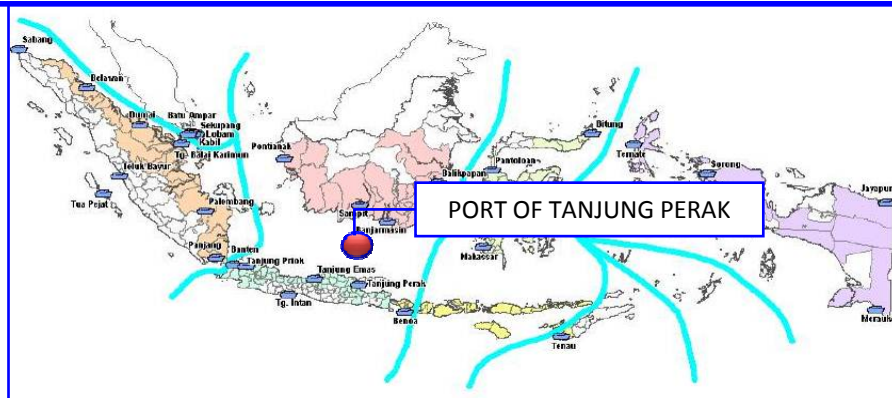
## PHASE II

- Quaywall
- Reclamation and soil improvement
- Yard pavement and building
- Road and bridge
- Container handling equipment
- Oil jetty



# RAILWAY TO CILAMAYA PORT

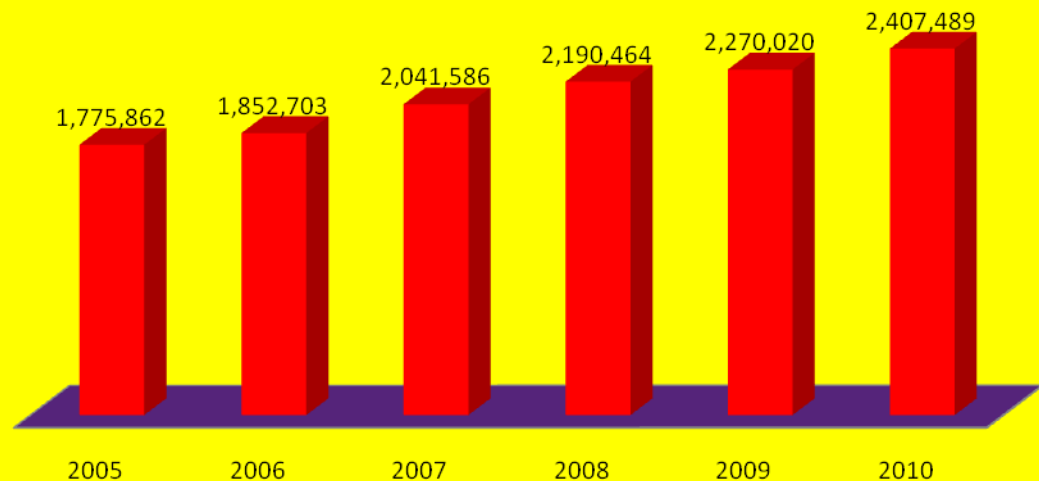




# PORT OF TANJUNG PERAK

HANDLING FACILITY	TOTAL UNIT
CGC 40 Ton	7
RTG 40 Ton	17
Transtainer 40 Ton	4
Top Loader 35-40 Ton	1
Side Loader 7,5 Ton	2
Reach Stacker 40 Ton	1
Chassis 20-40 Ton	103
Mobile Crane 15-30 Ton	1
Head Truck 40 Ton	43
Forklift 2-2,5 Ton	31
Forklift 3-4 Ton	1
Forklift 5 Ton	1
Forklift 7,5 Ton	1
Bagging Scale	3
Spreader	2
Reafer Plug	112

CONTAINER HANDLING STATISTIC IN PORT OF TANJUNG PERAK



NO	TERMINAL	BERTH	LENGTH (M)	BACKUP AREA (HA)
1	Convensional Terminal	10	1500	16.286
2	Container Terminal	7	1750	145
3	Dry Bulk Terminal	8	1040	6,73
4	Liquid Bulk Terminal	2	220	0,33
5	Passenger Terminal	3	330	0,67





PT PELABUHAN INDONESIA Tbk (PERSERO)

## TERMINAL TELUK LAMONG

TANJUNG PERAK SURABAYA

Sebagai pelabuhan modern, Teluk Lamong akan dibangun dengan seluruh infrastruktur penunjang

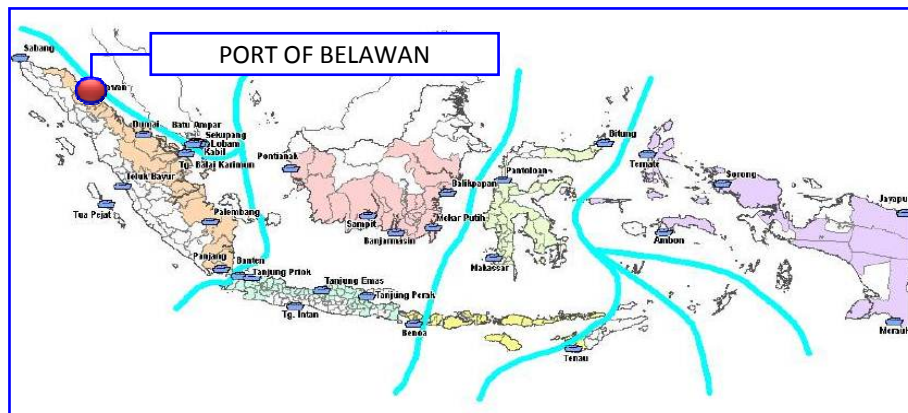
1. Infrastruktur terdiri dari :

- a. Dermaga sepanjang 1280 m, Trestle sepanjang 380 m, Jembatan Penghubung 2.563 m
- b. Causeway sepanjang 2,5 Km
- c. CY seluas 50 Ha
- d. CFS seluas 2.600 M2

2. Suprastruktur, terdiri dari :

- a. 12 Unit CC
- b. 36 Unit RTG
- c. 60 Unit Head Truck & Chassis

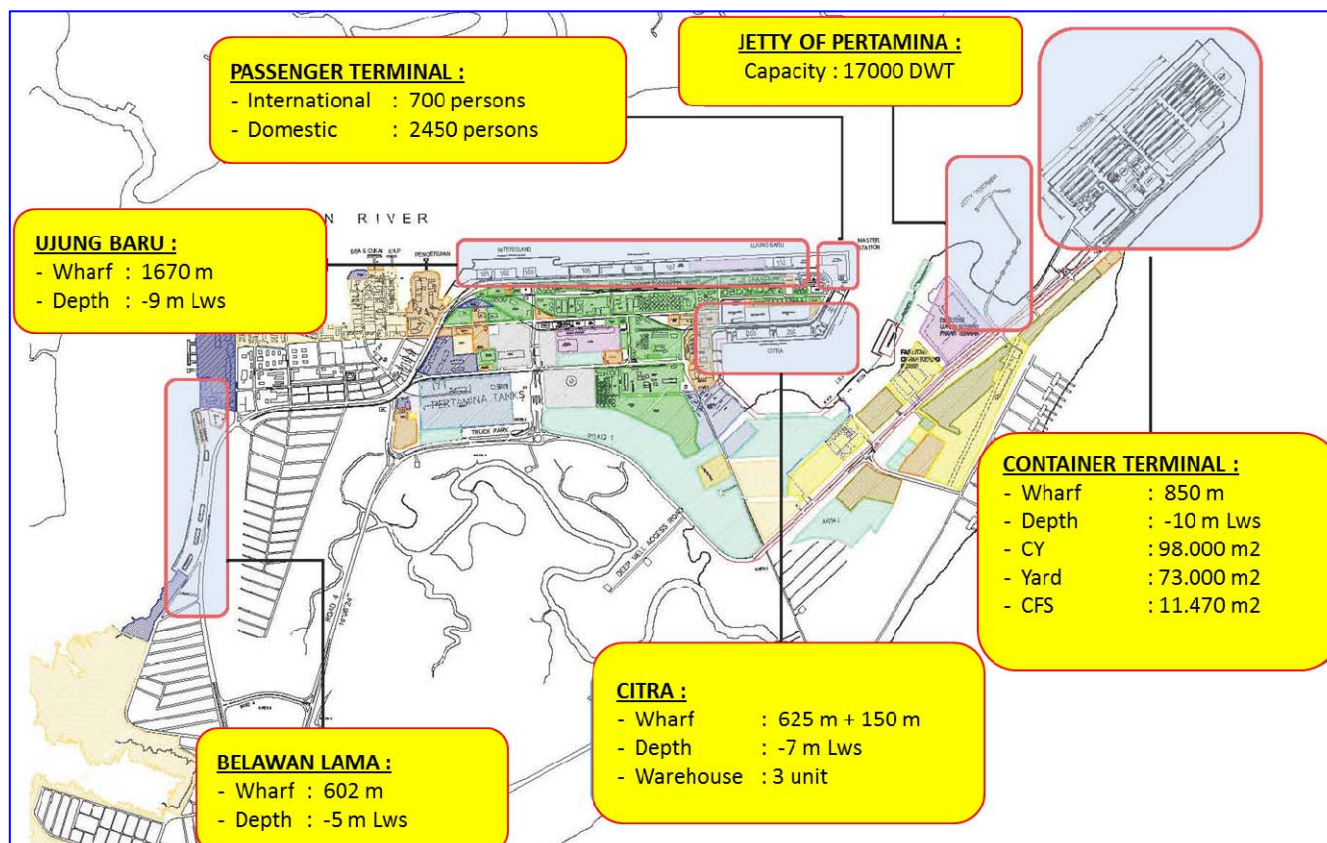
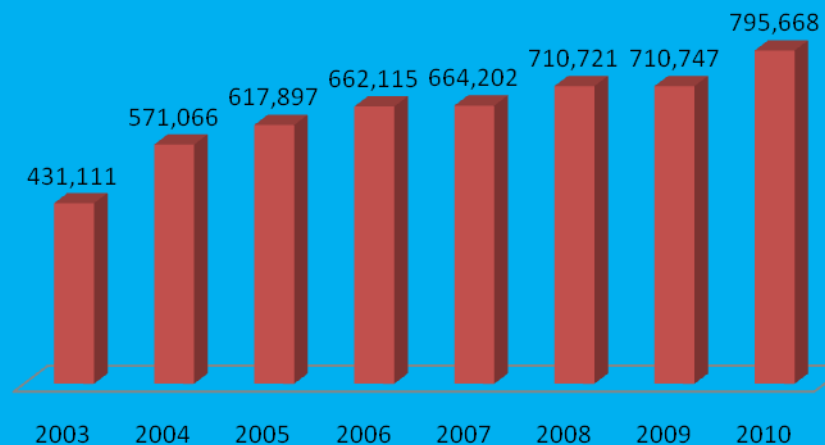




PORT OF BELAWAN

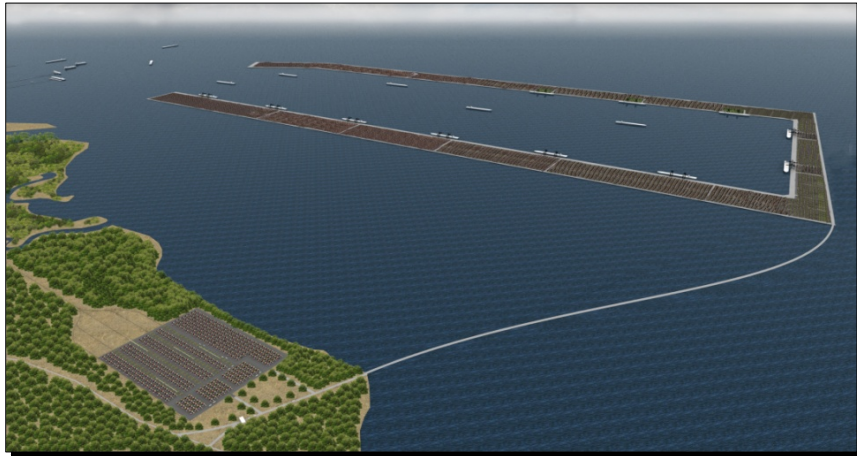
# PORT OF BELAWAN

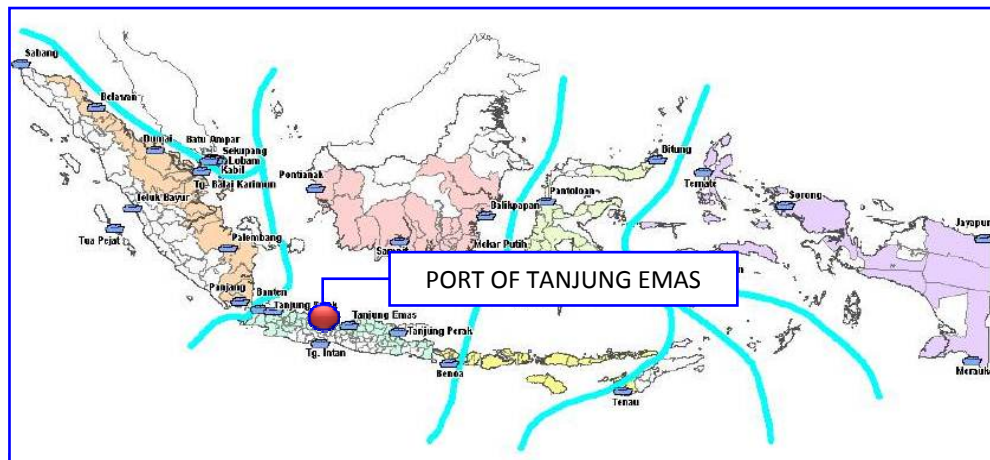
CONTAINER HANDLING STATISTIC IN PORT OF BELAWAN





## KUALA TANJUNG DEVELOPMENT PLAN

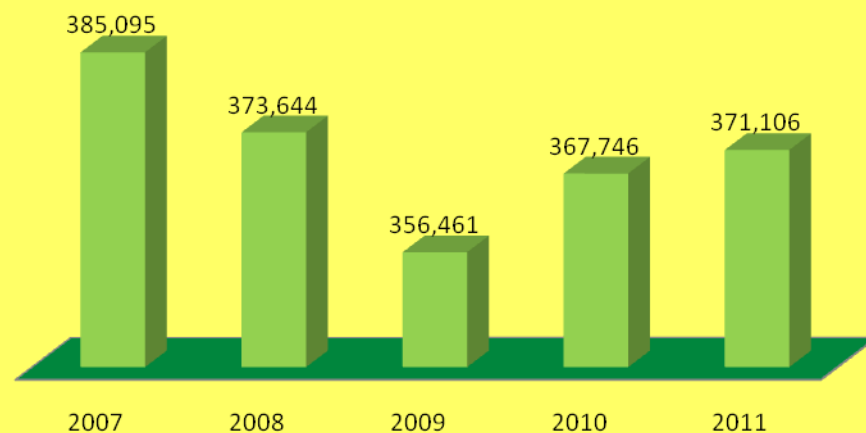




NO	FACILITY	LENGHT (M)	WIDTH (M)	DEPTH (- MLWS)
1	CHANNEL	2.400	100	10
2	CONTAINER WHARF / TPKS	495	25	10
3	SAMUDERA WHARF	575	25	9
4	NUSANTARA WHARF	320	20	7
5	EX. PLTU WHARF	65	30,15	6
6	PELABUHAN DALAM	1441	10	3,5
7	KBT / KBB	498 / 1777	1	2,5

## PORT OF TANJUNG EMAS

CONTAINER HANDLING STATISTIC IN PORT OF TANJUNG EMAS



NO.	NAME	QUANTITY	CAPACITY ( TON )
1	CONTAINER CRANE	5 UNITS	40
2	RUBBER TIRED GANTRY	13 UNITS	40
3	TOP LOADER	3 UNITS	35
4	SIDE LOADER	2 UNITS	5 ( EMPTY )
5	REACH STACKER	1 UNIT	40
6	HEAD TRUCK	25 UNITS	45
7	CHASSIS TRAILER	27 UNITS	20
8	MOBIL CRANE	3 UNITS	40
9	FORKLIFT ELECTRIC	6 UNITS	40



ECONOMIC CORRIDORS	TERMINAL						CDC/ MULTIMOD E	CRUISE TERMINAL	LAND/INF RASTRUC TURE	TOTAL (US\$ MILLION)
	CONTAINER	CPO	PETRO LEUM	COAL	OTHERS BULK	OTHERS TERMINAL				
SUMATERA	6.975	1.758	1.395	1.283	432	163	25	-	835	12.866
JAVA	8.556	8	1.674	240	236	624	720	620	2.642	15.321
BALI-NT	97	-	80	-	146	850	-	862	373	2.408
KALIMANTAN	644	550	356	1.405	535	924	-	-	213	4.626
SULAWESI	477	43	282	-	483	2.053	75	-	459	3.871
PAPUA	550	10	179	-	439	5.443	-	-	1.351	7.972
<b>TOTAL</b>	<b>17.299</b>	<b>2.369</b>	<b>3.965</b>	<b>2.927</b>	<b>2.273</b>	<b>10.058</b>	<b>820</b>	<b>1.482</b>	<b>5.872</b>	<b>47.064</b>

# PORT SECTOR INVESTMENT





*Terima Kasih*



*Thank You*