

Ad Hanafiah - CEO of TRADA Group



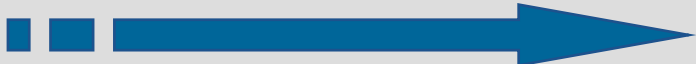
“INDONESIA SHIPPING PICTURE”

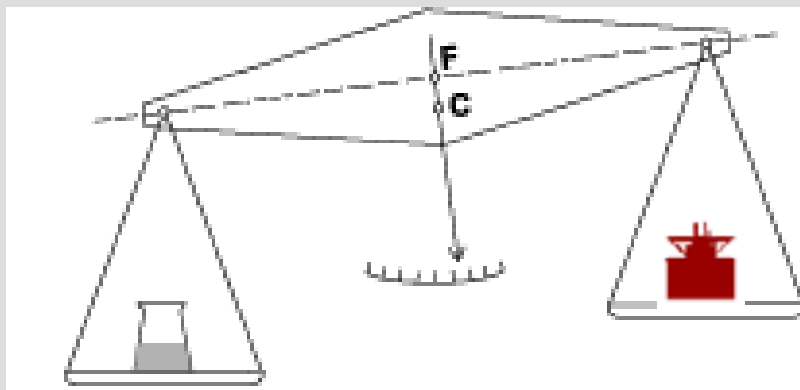
What does it consist of today and what can be tomorrow ?

Maritime Indonesia 2007 – Four Season Hotel 29 November 2007



THE SHIFT

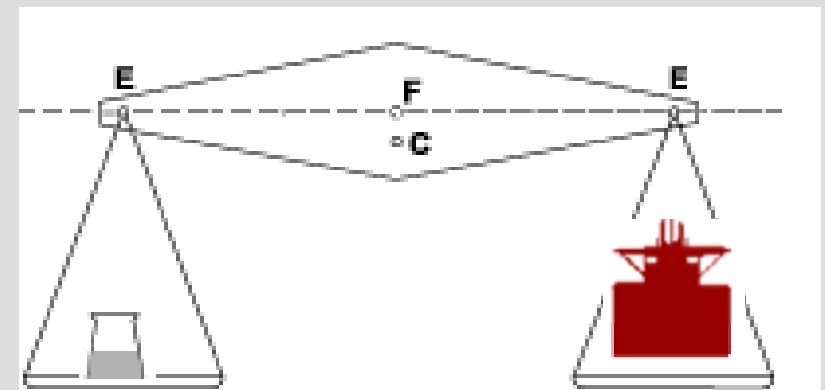
TODAY  TOMORROW



National Cargo

National Transport

UNBALANCE



National Cargo

National Transport

BALANCE

TODAY

- FINANCIAL SUPPORT: ENTRY POINT STAGE –
LESS CONFIDENT IN SPOT.
- DOMESTIC RATE: LESS ATTRACTIVE.

EXPANSION

- STARTING POINT: LOGISTIC PROCESS.
- FINANCIAL SUPPORT: MORE CONFIDENT IN SHORT TERM/
SPOT BUSINESS.
- TO FORM ALIANCE WITH COMMODITY PRODUCERS (GOVT./
PRIVATE OWNED).
- TO FORM PARTNERSHIPS WITH GLOBAL SHIPPING PLAYERS.

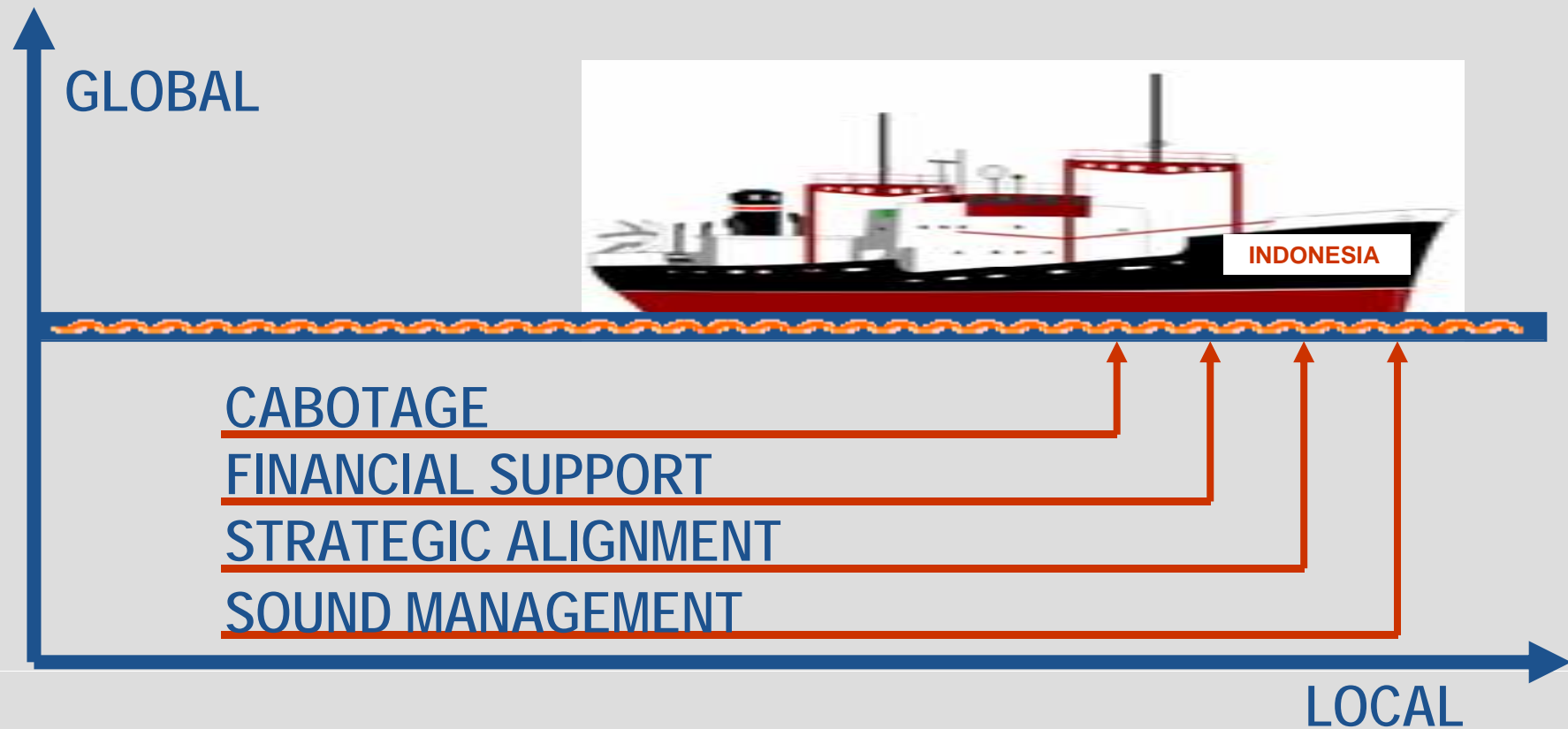
PARTNERSHIPS

- MIND SET: TAKING MAJOR ROLE IN LONG TERM.
- VALUE ADDED FOR NATIONAL OPERATORS.
- COMPETITIVE IN GLOBAL MARKET.

CONSOLIDATIONS

- NOT EASY – NOT MATURE – NOT COMMON YET.
- POSITIVE TO MARKET – SHOULD START.
- CHEMISTRY AMONG PLAYERS: CORPORATE CULTURE.
- EXPERTISE TO STRUCTURE WORKABLE FORMAT.

KEY FACTORS



TOMORROW

Bigger National Operators

More Strategic Alignment

More Balance Portion for Foreign Operators