GARUDA INDONESIA
“Pengelolaan dan Peta Bisnis Kargo Indonesia”

Rabu, 10 April 2019
Air Freight Business Mapping

Shipper
First Mile Agent
Consolidation & Delivery
Origin Airport
Cargo warehouse & terminal operations
Air Carrier
Transit Airport
Cargo warehouse & terminal operations
Destination Airport
Cargo warehouse & terminal operations
Last Mile Agent
Deconsolidation & Delivery
Consignee

GO-FREIGHTER
Develop freighter service to respond demand growth & network availability

GO-LOGISTCS
Develop logistic hub facilities to enhance efficiency in logistics / supply chain

GO-EXCELLENT
Develop integrated cargo system & standardized services
International Transshipment

Top 5 Route:
1. CAN - JED
2. MEL - CAN
3. OSA - MEL
4. AMS - MEL
5. AMS - SYD

Source : Internal GA

30 Million Kgs
20% Demand Growth
Domestic Transshipment

Outbound Transshipment

Inbound Transshipment

Source: Internal GA
Cargo Market – DPS

International Market Share DPS

Traffic Carried by Garuda Indonesia DPS vs CGK Estimate Full Year 2018

Route Share for Transshipment by GA (Kg)

<table>
<thead>
<tr>
<th>Traffic (kg)</th>
<th>Ngurah Rai Airport</th>
<th>Soekarno Hatta Airport</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transit</td>
<td>67.082.004</td>
<td>74.518.917</td>
</tr>
<tr>
<td>Outgoing</td>
<td>12.280.720</td>
<td>60.685.169</td>
</tr>
<tr>
<td>Incoming</td>
<td>14.626.325</td>
<td>35.742.336</td>
</tr>
</tbody>
</table>

*Include Transshipment, inbound, and outbound*
Potential Cargo Market

Cargo Traffic in+out CGK (kg)

<table>
<thead>
<tr>
<th>Year</th>
<th>Domestik</th>
<th>International</th>
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<tbody>
<tr>
<td>2017</td>
<td>313,218,631</td>
<td>280,247,953</td>
</tr>
<tr>
<td>2018</td>
<td>352,030,151</td>
<td>365,231,893</td>
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</table>

2017: 12% Domestic, 30% International

Total Traffic (Kg) Projection for Marine Product in SULAMPUA 2017 – 2022F

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<th>Year</th>
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12-15% Growth

Top 5 Air Freight Carrier in CGK

DOM Market Share for year 2018

- Garuda Indonesia: 61%
- Citilink Indonesia: 14%
- Lion Airlines: 15%
- Batik Air: 15%
- Sriwijaya Air: 6%

INT Market Share for year 2018

- Garuda Indonesia: 34%
- Singapore Airlines: 28%
- Cathay Pacific: 17%
- Emirates Airline: 10%
- Qatar Airways: 11%

Total Traffic (Kg) Projection for Marine Product in SULAMPUA 2017 – 2022F

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12-15% Growth
**Facilities Requirement**

**Warehouse Facilities:**
- Cool Room
- Cold Storage (pallet size)
- AVI Room
- AC Room
- HUM Room
- Valuable (Strong) Room
- DG Storage
- Automated System

**Benchmark**

<table>
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<tr>
<th>Requirement</th>
<th>Ideal Condition</th>
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<tr>
<td>Warehouse Space</td>
<td>Creation of multi stories warehouse as in HACTL or SATS Changi</td>
</tr>
<tr>
<td>% Cargo in Warehouse</td>
<td>100% inside W/H to avoid rain / heat 50,000 m² in size</td>
</tr>
<tr>
<td>Pallet storage Capacity</td>
<td>100 Pallet/day (depend on season)</td>
</tr>
<tr>
<td>Special Cargo Storage</td>
<td>Availability of cold storage for each commodity with pallet size</td>
</tr>
<tr>
<td>Meat/food storage with <strong>halal certification</strong> for Middle East market</td>
<td></td>
</tr>
<tr>
<td>Pharmaceutical storage</td>
<td>Re-oxygen pool for live fish transshipment from eastern Indonesia</td>
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**DPS TRANSHIPMENT VOLUME (kg)**

- 2018: 67,082,004 kg
- 2019: 87,206,605 kg
- 2020: 113,368,587 kg
- 2021: 147,379,163 kg
- 2022: 191,592,912 kg
- 2023: 249,070,785 kg

*Growth based on IATA CAGR 2019-2023*
Garuda Indonesia Supply Chain
Cargo Supply Chain

Door to Door Service

City to City Service

Port to Port Service
Scope e-freight (12 core documents)

Objective is not to transport these 12 documents in paper form between origin forwarder and destination forwarder (except where specifically allowed by the e-freight Operating Procedures – e-FOP)

Interface between Shipper and Forwarder (at origin and destination) can be paper or electronic