

## “Hybrid Seminar on the Futures of Maritime Supply Chains in Southeast Asia ”

### Session 1: The Future of Maritime Transportation in Thailand

Presented by

**Dr. Chaichan Chareonsuk**

*Chairman, Thai National Shippers' Council*

Tuesday, 28<sup>th</sup> February 2023

Rehabilitate to the New Balance... **MORE VALUE, MORE COOPERATION**

Green Logistics • Trade Facilitation • Innovation • Circular Economy • Sustainability

## EXPORT/IMPORT

## LOGISTICS

### Key Challenges

- Strategic countries
- Tariff & Non tariff barrier
- Trade Facilitation
- FTA
- Trade Promotion

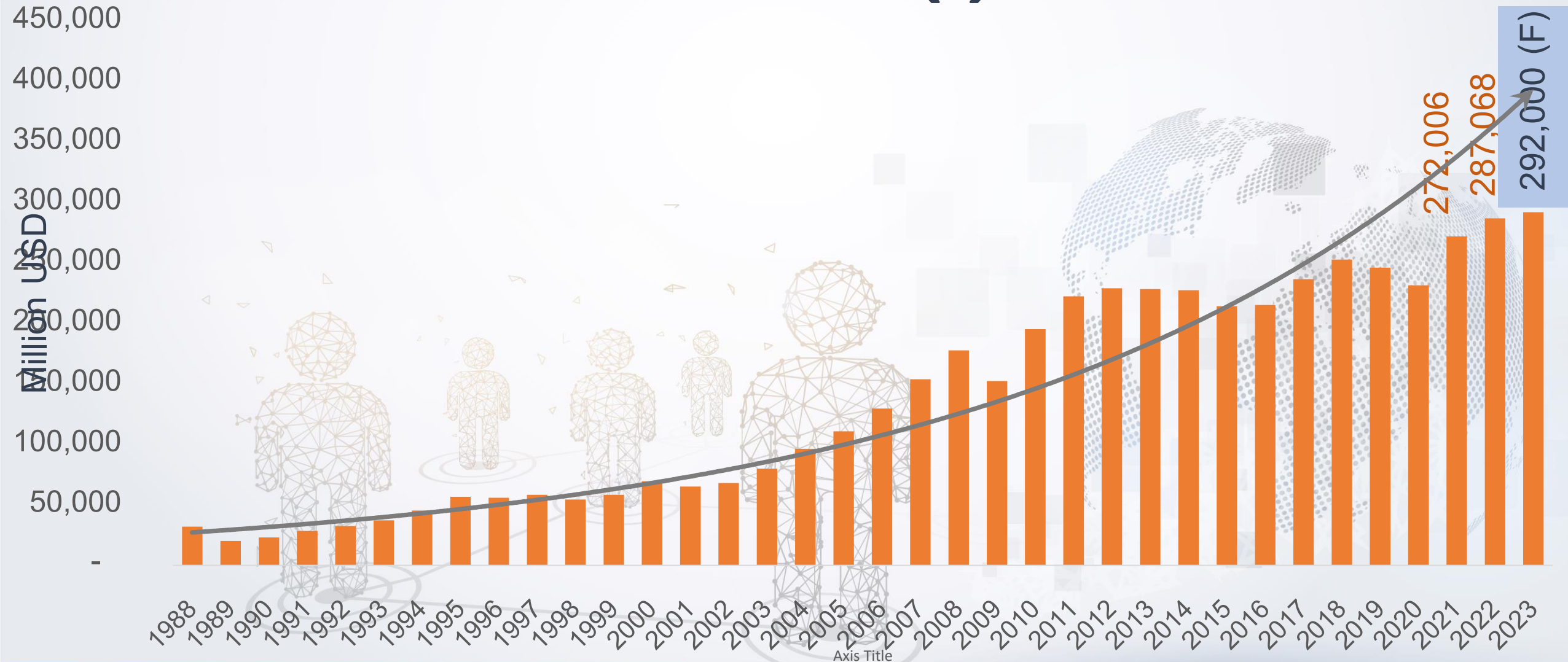
### Key Challenges

- Trading Nation
- Information flow
- Capital flow
- NSW
- NDTP trading platform
- Multimodal transportation
- Global trade connectivity

### Key Challenges

- Logistics infrastructure
- Service quality
- Fair trade freight cost and other extra cost
- Logistics standardization

# Thai export value historical data 1988 – 2023 (F)



Countries/regions have prospects to boost trade in 2023 due to potential high Purchasing power, local demand, working-age workers, and the rate of economic growth continues.

## Middle East



1. GDP 2023 (F)
  - Saudi Arabia 3.7%
  - Iraq = 5.7
  - UAE = 3.7%
2. Average PMI > 50
3. Thai export portion = 3.6%
4. Trade related closely
5. Mega Project a lot
6. High Purchasing power
7. Working-age
8. Energy security



## CLMV (ASEAN)



1. GDP 2023 (F) = 6.1%
2. Average PMI
  - Vietnam 52
  - Myanmar 43
3. Thai export portion = 11%
4. Regionalization
  - Supply chain
  - Trade
  - Investment
5. Transport Connectivity
6. Production Base
7. Working-age
8. Low minimum wage



## India

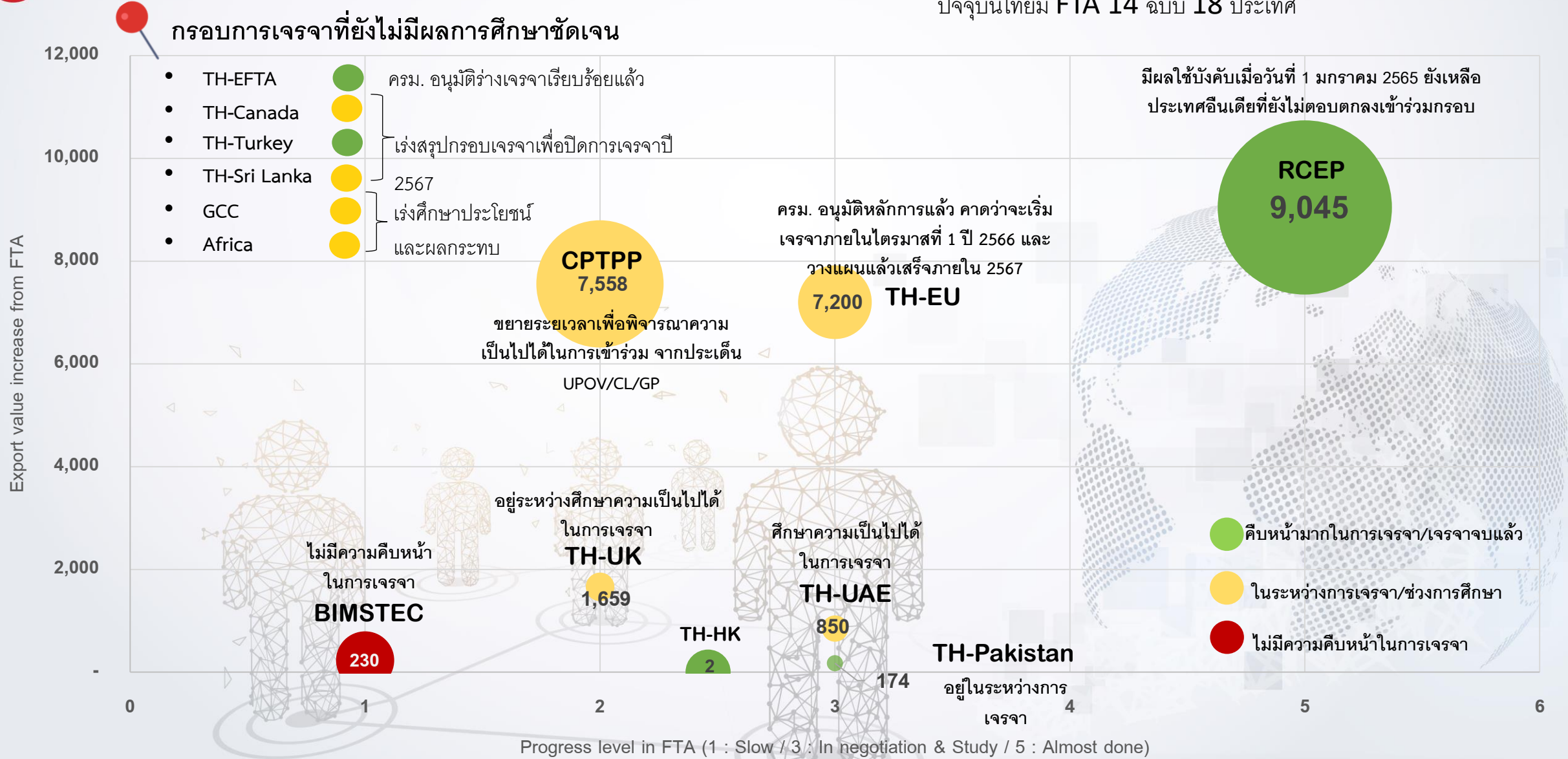


1. GDP 2023 (F) = 4.5%
2. Average PMI > 55
3. Thai export portion = 3.7%
4. Fast-growing & Urbanizing population
5. Low minimum wage
6. Agricultural & Resource Innovations
7. Accelerated negotiation on RCEP



# Thailand FTA Progress VS Increasing Export volume

ปัจจุบันไทยมี FTA 14 ฉบับ 18 ประเทศ



ตัวเลขใน bubble แสดงถึงมูลค่าการส่งออกของไทย (MUSD) ที่อาจเพิ่มขึ้น หากมีการทำ FTA

# TNSC Raising The proposal to Solve international sea freight problem to the international level "GLOBAL FAIRTRADE COMMITTEE."



June 17, 2021  
Feb 24, 2022

Biden pushing to lower ocean shipping costs, fight inflation  
By JOSH BOSAK June 10, 2022



Will other do the same?  
: This crisis is global issue; we need collaboration in global level!

Biden to urge FMC to step up enforcement, work with DOJ  
Mark Szakonyi, Executive Editor | Jul 08, 2021 10:01AM EDT



US importers and exporters have been urging the Biden administration to get directly involved in relieving US port congestion. Photo credit: Shutterstock.com.



Nov 10, 2021



Rehabilitate to the New Balance... MORE VALUE, MORE...



ส.น. พลัดต้นแนวทางแก้ไขปัญหาการขนส่งสินค้าทางทะเล และวิกฤตห่วงโซ่อุปทาน ผ่านเวที UNCTAD



July 13, 2021  
Dec 15, 2021



July 2021  
By Marine Department



Jan 13, 2022  
By Marine Department



Sep 8, 2021



WTO

FAIR TRADE COMMITTEE

NATIONAL COMPETITION AUTHORITIES

Shipping Lines

Shippers



# Global Shippers' Alliance & Asian Shippers' Alliance Annual Meeting 2022

10-12 October 2022, Bangkok, Thailand

Global Shippers' Alliance & Asian Shippers' Alliance Annual Meeting 2022

การประชุมพันธมิตรผู้ส่งสินค้าโลกและการประชุมพันธมิตรผู้ส่งสินค้าแห่งเอเชีย ประจำปี ๒๕๖๕



**2022 Bill of Cargo Right Manifesto**

**Global Fair-Trade Committee on  
Maritime Transport**

**Freight Charge  
Portal**

**Domestics Laws**

**Closer  
Collaboration with  
Shipping Lines**

**Promote Digital  
Supply Chain**

## 2022 Bill of Cargo Right Manifesto



## Global Fair-Trade Committee on Maritime Transport

1. **Contracts terms should be fair and balanced**
2. **Reliability of the sailing schedules**
3. **Service calls accurately and swiftly reported**
4. **No shows by shipper vs. roll-overs by carrier**
5. **Imposition of surcharges by carrier should be limited to unforeseeable temporary external events. Duplication of surcharges billing, should be prohibited.**
6. **Detention and demurrage should be appropriately evidenced**
7. **Quality of empty containers delivered**
8. **Trustable carbon footprint information and digital documentation**

Related government agencies: Marine Department / Office of the Trade Competition Commission

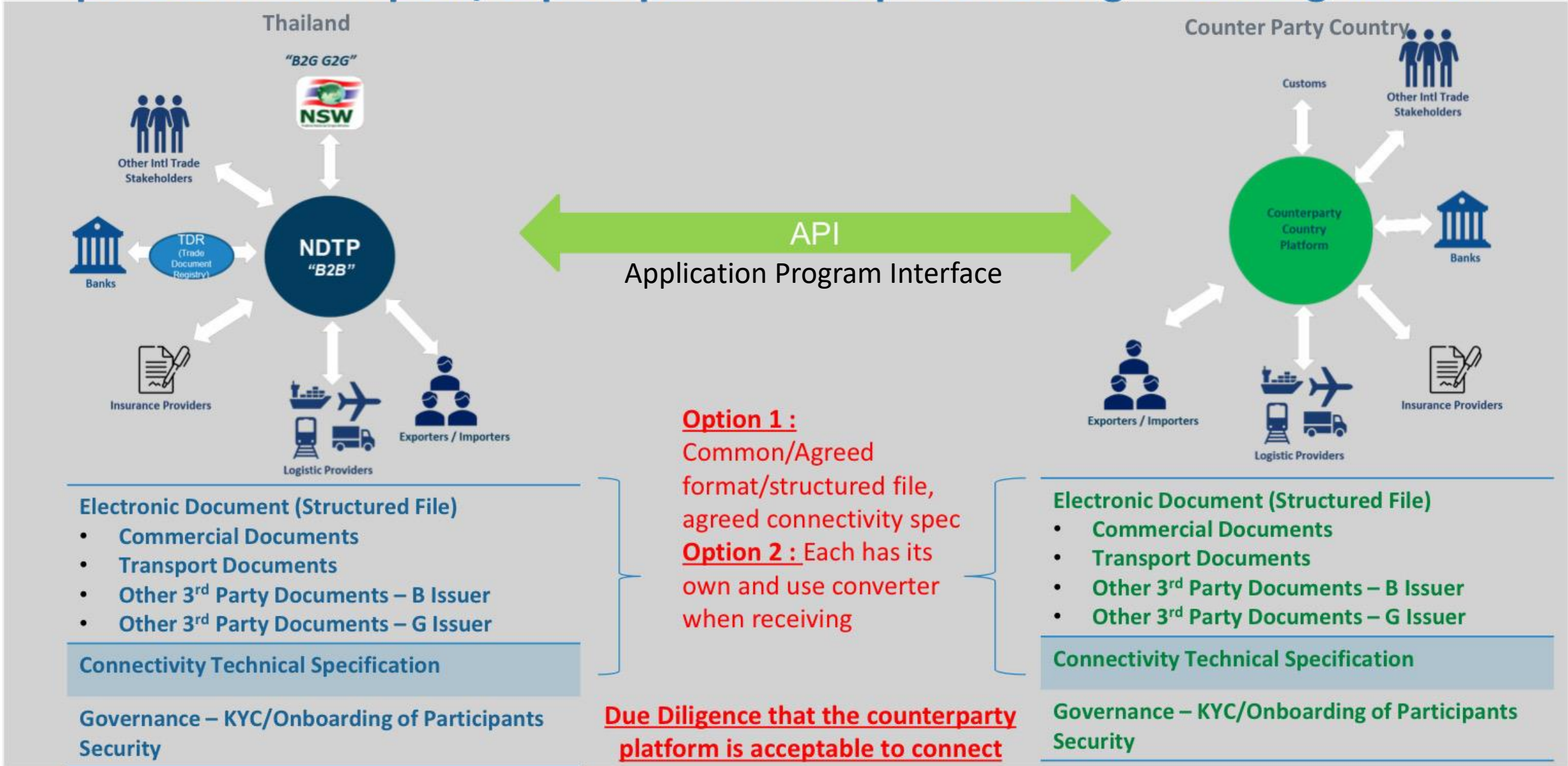


Related government agencies : Department of Trade Negotiations / Marine Department / Office of the Trade Competition Commission



# 7.3

## Standards or Guidelines to minimize time and efforts between the two parties in an import/export pair will help facilitating Trade Digitization



|                         | Logistics Flow  | Progress  | Key future Challenge   |
|-------------------------|---|---|--|
| <b>Physical Flow</b>    | <ul style="list-style-type: none"> <li>- Lam Chabang Phase 3</li> <li>- High-speed train linking Thailand-Laos-China : 6 stations (253 km) and High-speed train connecting the EEC 3 stations (220 km)</li> <li>- Utilization of Container Yards across the country</li> </ul>    | <ul style="list-style-type: none"> <li>- Approximately 5% of the construction has been completed, set to be completed in 2025</li> <li>- High-speed train linking Thailand-Laos-China is under construction, Open for service in 2028 (Passenger) / Railway linking 3 airports set to be completed in 2025</li> <li>- Develop utilization of CY across the country to take full advantage.</li> </ul> | <ul style="list-style-type: none"> <li>- Increase the capacity of Laem Chabang Port to be able to handle 18M TEUs/year</li> <li>- Facilitate in transportation to attract investors</li> <li>- Encourage private sector to have co-investment in CY</li> </ul>       |
| <b>Information Flow</b> | <ul style="list-style-type: none"> <li>- Port Community System (PCS)</li> <li>- National Single Window (NSW)</li> <li>- National Digital Trade Platform</li> <li>- Regulatory issues related to transshipment or cross-border to induce more large vessels to Thailand</li> </ul> | <ul style="list-style-type: none"> <li>- PCS set to be completed in 2024</li> <li>- NSW is under development and linkage to ASEAN/domestic agencies</li> <li>- In discussion with stakeholders public and private sectors and related product groups</li> </ul>   | <ul style="list-style-type: none"> <li>- When the development of the PCS is completed, it will be connected to NSW/ International PCS</li> <li>- Elevate NSW to be Single Submission</li> <li>- Promoting Laem Chabang Port as a <b>Transshipment Hub</b></li> </ul> |
| <b>Capital Flow</b>     | <ul style="list-style-type: none"> <li>- Co-invest in EEC / Port Operator</li> <li>- Emphasis on investment in legacy existing infrastructure</li> </ul>  | <ul style="list-style-type: none"> <li>- Development of Hinterland</li> <li>- The government started investing in the development of existing infrastructures such as CY</li> </ul>   | <ul style="list-style-type: none"> <li>- Attracting the private sector domestically/internationally joint venture in EEC / Develop more Hinterland and CY areas</li> </ul>   |

# สรท. เร่งสนับสนุนส่งออก สร้างการค้า และลดต้นทุนผู้ส่งออกสู่ตะวันออกกลาง



# Future of International

## Green Logistics and Transport



The 17 SDGs :

17 Sustainable Development Goals

**CBAM** อีกหนึ่งมาตรการ...  
เรื่องการปรับตัวของผู้ส่งออก

มาตรการปรับราคาคาร์บอนก่อนเข้าพรมแดน

**บังคับใช้กับ**  
สินค้านำเข้าจากประเทศนอก EU  
มีราคาสูงกว่า 150 ยูโร และอยู่ในอุตสาหกรรมเป้าหมาย  
5 อุตสาหกรรมแรก คือ ซีเมนต์ บริการไฟฟ้า ปู๋ เหล็กและเหล็กกล้า และอะลูมิเนียม

**ปี 2022**  
ผู้ส่งออกไทย  
เร่งทำความเข้าใจ  
และปรับตัว

**ปี 2023 - 2025**  
CBAM บังคับใช้ 3 ปีแรก  
รายงานข้อมูลการนำเข้าและ  
การปล่อย CO<sub>2</sub> ทุกไตรมาส

**ปี 2026**  
CBAM บังคับใช้เต็มรูปแบบ  
รายงานข้อมูล และยื่นหลักฐาน  
การจ่ายค่าธรรมเนียม CBAM  
Certificates ภายในวันที่  
31 พ.ค. ของทุกปี

มาตรการด้านสิ่งแวดล้อม  
จาก EU และประเทศคู่ค้าอื่น  
จะทวีความเข้มงวดขึ้น

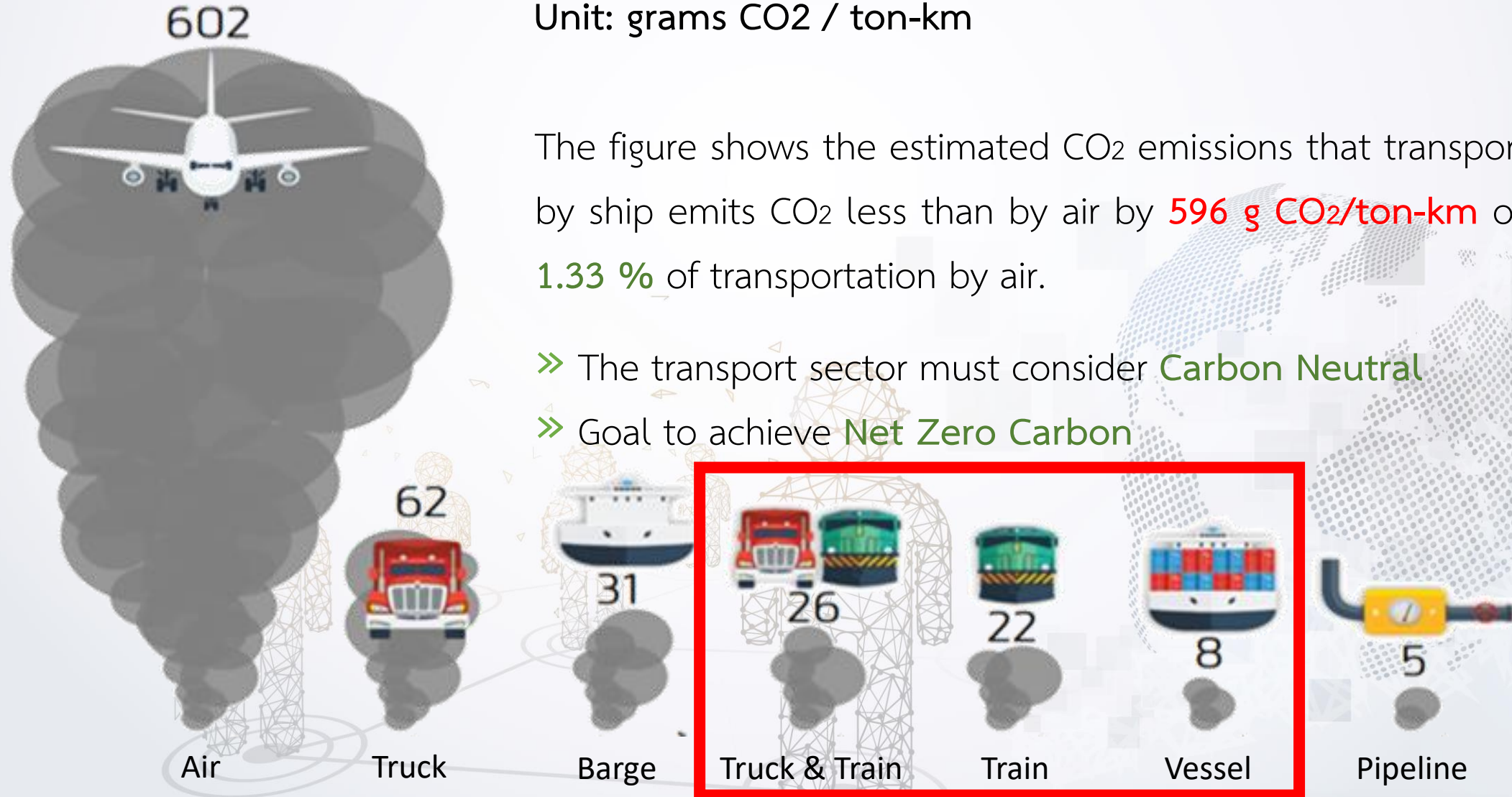
**ปี 2050**

CBAM :

Carbon Border Adjustment Mechanism

# Examples of CO<sub>2</sub> emissions from the transport sectors

Unit: grams CO<sub>2</sub> / ton-km



The figure shows the estimated CO<sub>2</sub> emissions that transportation by ship emits CO<sub>2</sub> less than by air by **596 g CO<sub>2</sub>/ton-km** or only **1.33 %** of transportation by air.

- » The transport sector must consider **Carbon Neutral**
- » Goal to achieve **Net Zero Carbon**



key indicators

- |  |  |  |
|--|--|--|
| <ul style="list-style-type: none"> <li>CO2 emission</li> <li>Turn-around time</li> </ul> | <ul style="list-style-type: none"> <li>Water and air quality</li> <li>Wasted Time</li> </ul> | <ul style="list-style-type: none"> <li>Operation Time of Vessel</li> </ul> |
|--|--|--|

Infrastructure

- |   |   |  |
|---|---|--|
| <ul style="list-style-type: none"> <li>Build the Buffer Area</li> </ul> | <ul style="list-style-type: none"> <li>Development of CY/Truck Route</li> </ul> | <ul style="list-style-type: none"> <li>Shore Power Supply</li> </ul> |
|---|---|--|

Vehicle & Tools

- |   |   |  |
|---|---|--|
| <ul style="list-style-type: none"> <li>Support Green Vehicle</li> </ul> | <ul style="list-style-type: none"> <li>AI / IOT / Automate</li> </ul> | <ul style="list-style-type: none"> <li>Quaywall Crane Development</li> </ul> |
|---|---|--|

Information Technology

- |   |   |   |
|---|---|---|
| <ul style="list-style-type: none"> <li>Real-time container information linkage</li> <li>Smart Traffic Control system</li> </ul> | <ul style="list-style-type: none"> <li>Accelerate the development of PCS and NSW</li> </ul> | <ul style="list-style-type: none"> <li>Link Vessel Tracking system</li> </ul> |
|---|---|---|

Rules & Laws

- |  |  |
|--|--|
| <ul style="list-style-type: none"> <li>Modify port operations &amp; related government sectors to be 24/7</li> </ul> | <ul style="list-style-type: none"> <li>Compliance with IMO's Low Sulfur Regulation and MARPOL</li> </ul> |
|--|--|



# White Paper : CLMVT Connectivity

## Multimodal transportation in Next Normal

This study project has gathered information and analyzed details to comparison costs, challenges, opportunities and obstacles as alternatives for determining the mode of transport to CLMV countries and China.



Scan QR Code for e-Book

To support and encourage entrepreneurs in all sectors, especially SMEs, to understand the impact and prepare to adjust to be able to compete in regional trade.



สภาผู้ส่งสินค้าทางเรือแห่งประเทศไทย



# ศึกษาดูงานและสร้างเครือข่ายทางธุรกิจ บนเส้นทางรถไฟความเร็วลาว-จีน



ตลาดหลังชือวาน ตลาดค้าส่งที่ใหญ่ที่สุดในคุนหมิง



ท่าบกท่าบ้านแลง และเวียงจันทน์โลจิสติกส์พาร์ค



สถานีรถไฟเวียงจันทน์ สปป.ลาว

**พิธีทศกาลส่งออก CHINA**  
Cross Border E-Commerce

- ภาพรวมโอกาสสินค้าไทยในประเทศจีน
- ช่องทางจัดจำหน่าย Online - Offline
- เอกสาร เภตราฐาน นำเข้า ส่งออก - Marketing Plan
- โอกาสสินค้า แล.ประเภท
- ทิศทางสู่ความสำเร็จ

**FREE**

# 4 วัน 3 คืน

## 13-16 มิถุนายน 2566

เปิดรับสมัครตั้งแต่วันที่ - 31 มีนาคม 66

สมัครตอนนี้รับฟรีคอร์สอบรม

## เปิดเส้นทางการค้า สำรองเส้นทางรถไฟ ลาว-จีนตลอดเส้นทาง

ร่วมศึกษาย่านการค้าสำคัญและแหล่งการค้าใหญ่ที่สุดในตะวันตกเฉียงใต้ของจีน  
พบผู้นำเข้าสินค้าไทย - จีน ช่องทางโอกาสทางการตลาด

ในการจำหน่ายสินค้าไปยังประเทศจีน

**Member**  
**59,000**

**Non-Member**  
**65,000**

สนใจติดต่อ (คุณสิริพรรณ, คุณกฤชภัท)  
โทร.02-6797-555 ต่อ 501,500

ราคาเริ่มต้น

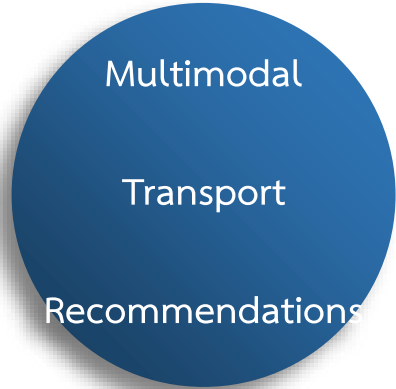
ราคาเริ่มต้น





# The Recommendations from the Project

9



Example

- Infrastructure Development
- Accelerating NSW Development
- G2G level link

22



Example

- Accelerate the development of ICD and CY
- Logistics Park Construction
- Elevate the standard of coastal feeder

5



Example

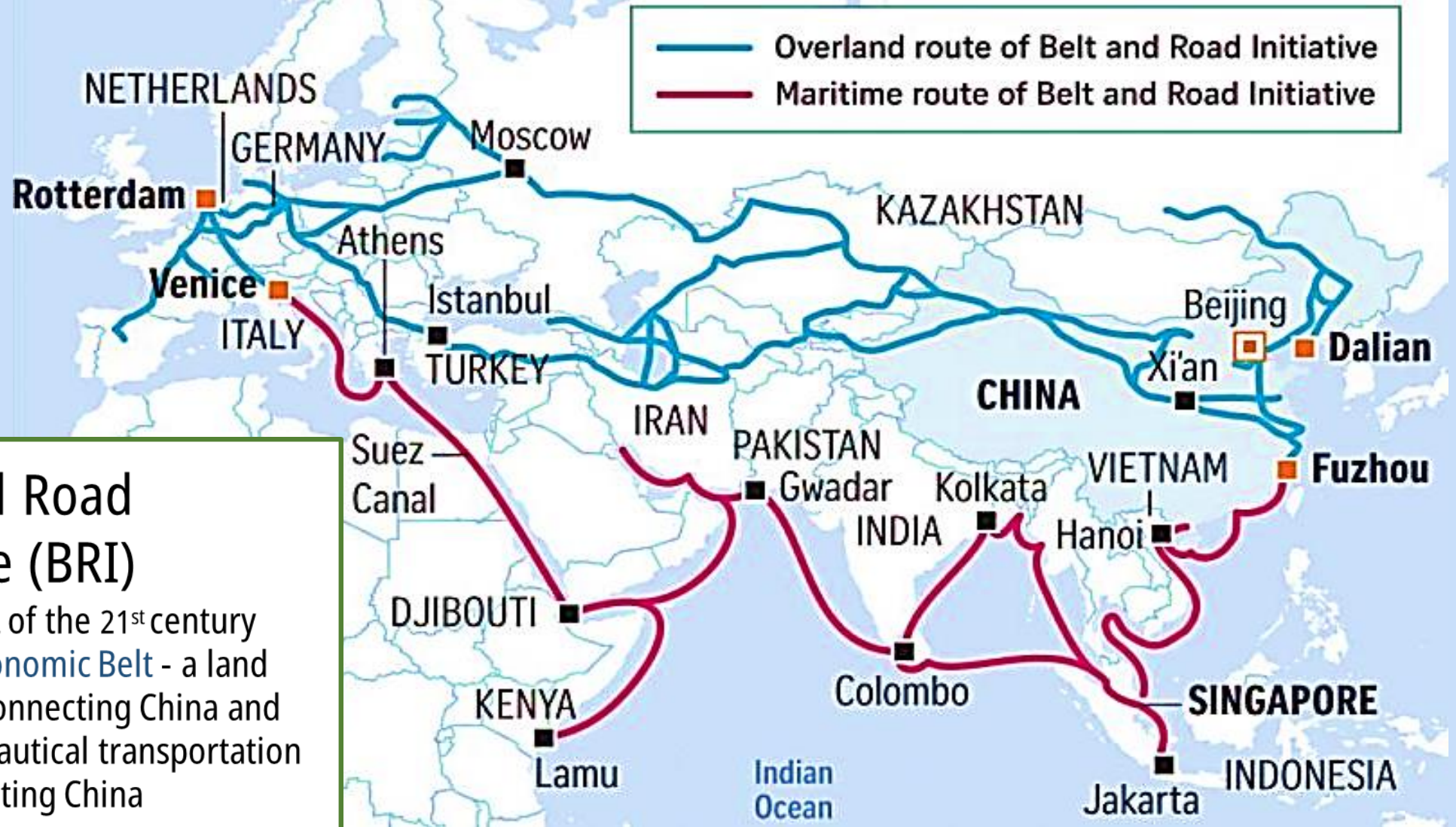
- Using a centralized trading platform
- Study and set a standard of containers
- Leveraging Existing Legacy Infrastructure + Soft Side

13



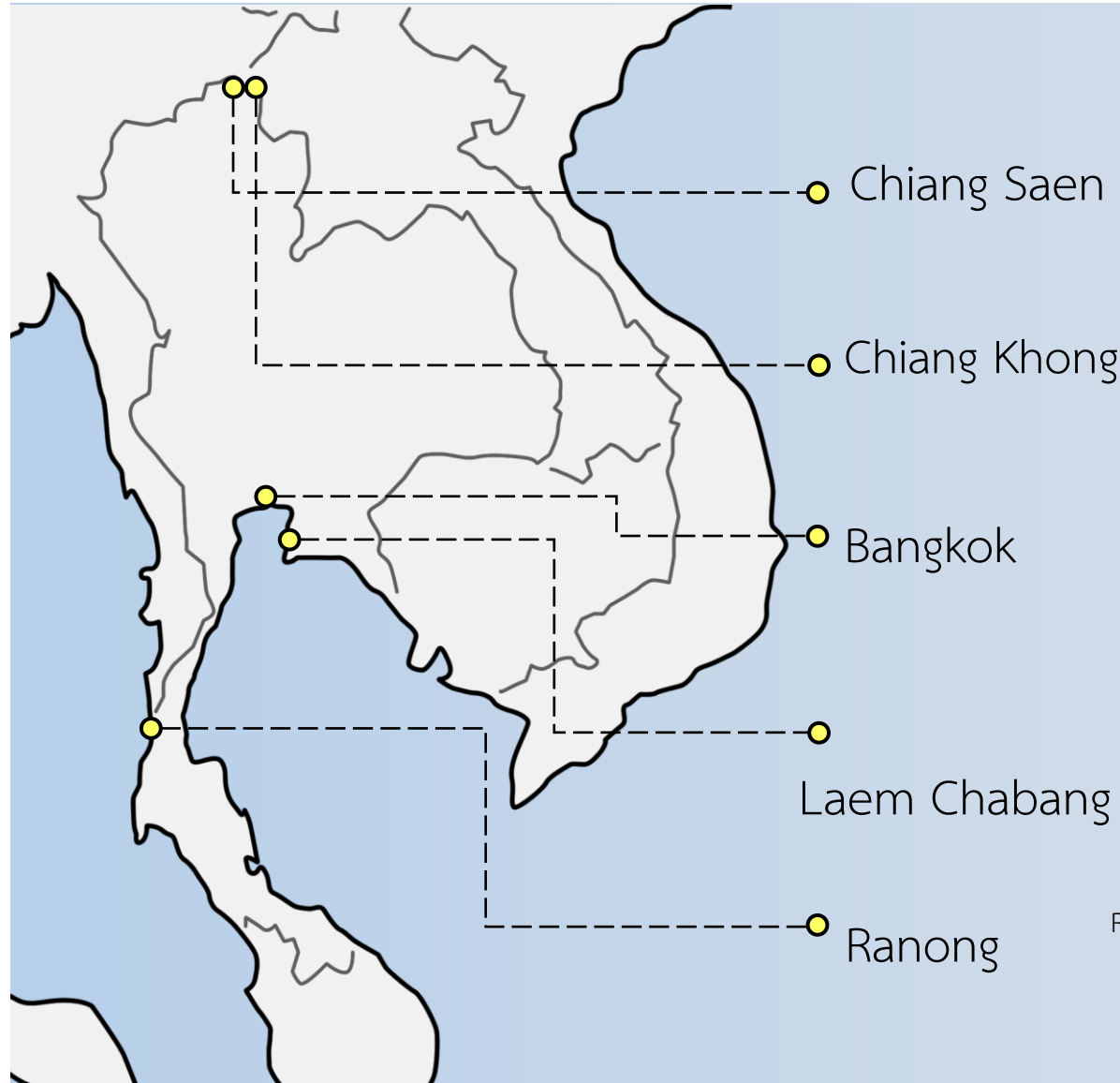
- Ministry of Commerce
- Ministry of Foreign Affairs
- Ministry of Transport
- State Railway of Thailand
- Port Authority of Thailand
- Department of Customs
- Department of Land Transport
- Marine Department
- Department of International Trade Promotion
- Department of Highways
- Trade Competition Commission Thailand
- Office of Transport and Traffic Policy and Planning
- Office of the National Economic and Social Development Council

# BRI Belt & Road Initiative



## Belt and Road Initiative (BRI)

The Silk Road project of the 21<sup>st</sup> century includes **Silk Road Economic Belt** - a land transportation route connecting China and **Maritime Silk Road** - a nautical transportation route connecting China



## Development

Study and Locate

2<sup>nd</sup> Chiang Saen Port

Becoming a Logistics Hub of Northern

Semi-Automated Container Terminal and Bangna-At Narong Expressway

Development of Gate, Tugboat and Automation System in Lam Chabang Phase 3

Repair & Development of Terminal 1-2 and Build 3<sup>rd</sup> terminal & Container Yard

## Challenges

changing of demand

4<sup>th</sup> Friend Bridge is more popular

changing of demand

4<sup>th</sup> Friend Bridge is more popular

Mid-town Located

Unable to expand the area

Government policy on EEC

And infrastructure readiness

Western Gateway

Via new rail routes and becoming a

BIMSTEC Connecting HUB

## Rail & Road Recommendations



- Proposed the establishment of Common Control Area (CCA) for joint inspection between 3-4 countries on the route
- Raise the level of ICD in key areas
- **Set up ICD around Bangkok**
- **Logistics Park / Inland Distribution Center**
- Utilization of the **CBTA** Agreement to Facilitate Transportation
- **Concessions for rail systems to be operated by the private sector in order to be able to invest in facilities**
- locate space to support value-added activities and management activities of products in the form of logistics industrial estates

## Other Recommendations



- Use a centralized trading platform to link with **Stakeholders** such as **NDTP**
- Study and set a standard of containers
- Establish a **Joint Trade Committee**
- Leveraging Existing Legacy Infrastructure and push improvements in **soft side regulation** and **facilitation**

## Maritime Recommendations



- Technical support & capability development of maritime transport between Thailand and neighboring countries in the sub-region
- **Hinterland connectivity Infrastructure** development, Increase the capacity for larger ships, **Port Automation Support, E-port** and **Intermodal Facilities Development**
- Encourage international cooperation to create bargaining power against shipping lines (**Fair Trade Committee**)
- Study the benefits of the Chumphon-Ranong Land-bridge Project
- Develop and promote waterway transport, Elevate the standard of **Coastal Feeder, Promote Coastal Shipping, Inland Waterway and Short Sea Shipping Network** between CLMVT countries

Thank you



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