



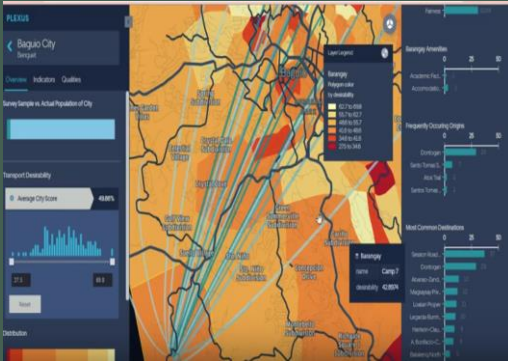
The Enrique K. Razon, Jr.
Logistics Institute

Prospects and Challenges of Philippine Logistics

Ensuring Industry Competitiveness, Seamless Goods Movement

What to expect

- **State of Philippine Logistics**
- **Challenges**
- **Key Points**



Philippine Logistics Industry

Philippines Overall Logistic Market Size

CAGR (2017-2022P): 6.3%
CAGR (2022P-2027F): 8.2%



Philippines Freight Forwarding Market size

CAGR (2017-2022P): 4.9%
CAGR (2022P-2027F): 7.2%



Philippines Warehousing Market size

CAGR (2017-2022P): 8.2%
CAGR (2022P-2027F): 6.4%



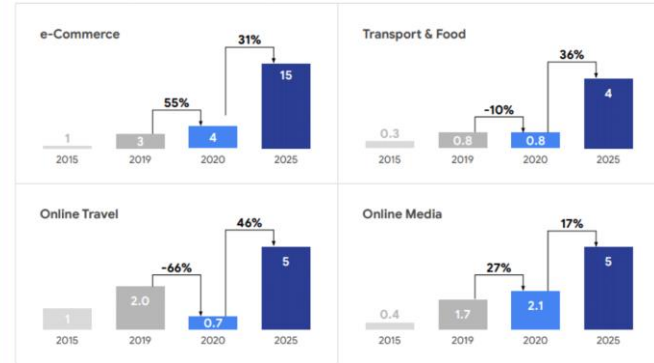
Philippines Cold Chain Market Size

CAGR (2017-2022P): 11.6%
CAGR (2022P-2027F): 8.1%



Major Competitors

Royal Cargo, 2Go Logistics, Fastcargo Logistics



Logistics Performance index



(Out of 5)

2023 LPI Scores of Select East and Southeast Asian Economies

PHILIPPINES IMPROVES IN LOGISTICS PERFORMANCE INDEX

The Philippines' overall score improved by 0.4 point to 3.3 out of 5 in the seventh edition of Logistics Performance Index (LPI) published by the World Bank. This put the economy at the 43rd out of 139 economies, leaping by 17 notches from 60th place in 2018. The index measures the speed of trade with indicators derived from big datasets tracking shipments.



Philippines' Historical Ranking

Year	Rank
2007	65/150
2010	44/155
2012	52/155
2014	57/160
2016	71/160
2018	60/160
2023	43/139

Philippines' Profile (2023)

(Out of 5)

Customs Score	2.8
Infrastructure Score	3.2
International Shipments Score	3.1
Logistics Competence and Quality Score	3.3
Timeliness Score	3.9
Tracking and Tracing Score	3.3

Top 3

2023 Rank (Out of 139)	Economy	2023 LPI Score (Out of 5)
1	Singapore	4.3
2	Finland	4.2
=3	Denmark	4.1
=3	Germany	4.1
=3	Netherlands	4.1
=3	Switzerland	4.1

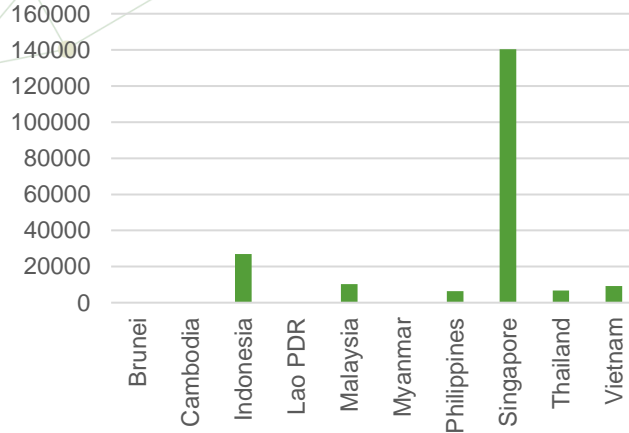
Bottom 3

2023 Rank (Out of 139)	Economy	2023 LPI Score (Out of 5)
=139	Libya	1.9
=139	Afghanistan	1.9
138	Somalia	2.0
=135	Haiti	2.1
=135	Cameroon	2.1
=135	Angola	2.1

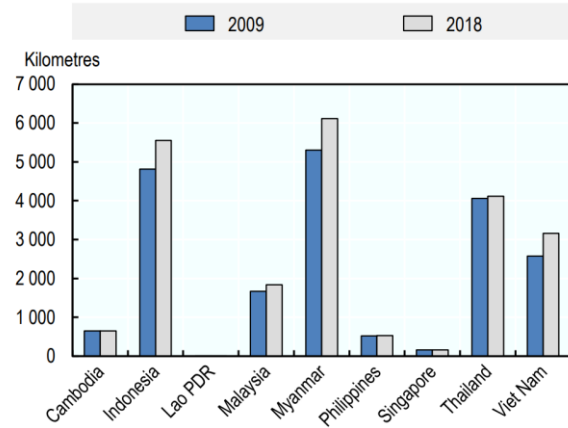
SOURCE: 2023 LOGISTICS PERFORMANCE INDEX BY WORLD BANK ([HTTPS://LPI.WORLDBANK.ORG/REPORT](https://lpi.worldbank.org/report)) BUSINESSWORLD RESEARCH; MARIEDEL IRISH U; CATALIAGO BUSINESSWORLD GRAPHICS; BONG R. FORTIN

Poor Infrastructure

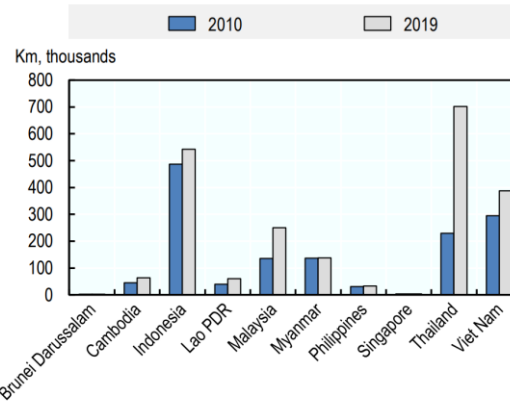
Port Total Carrying Capacity (DWT, Thousand)



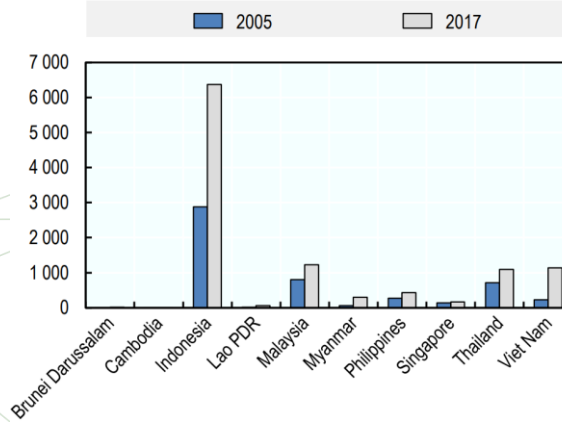
Railway Length (km)



Road Length (km)

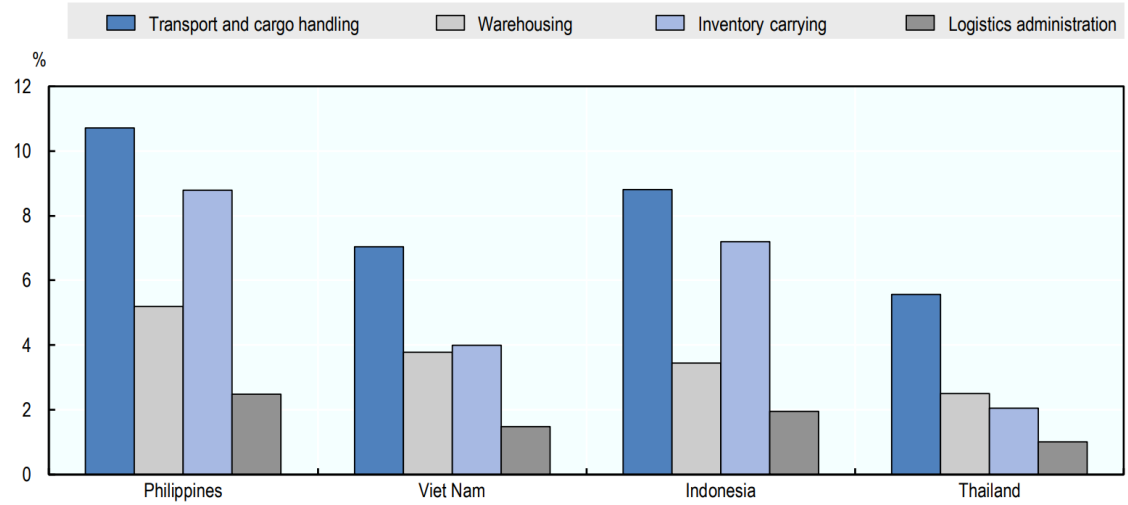


Number of Registered Trucks, in Thousands

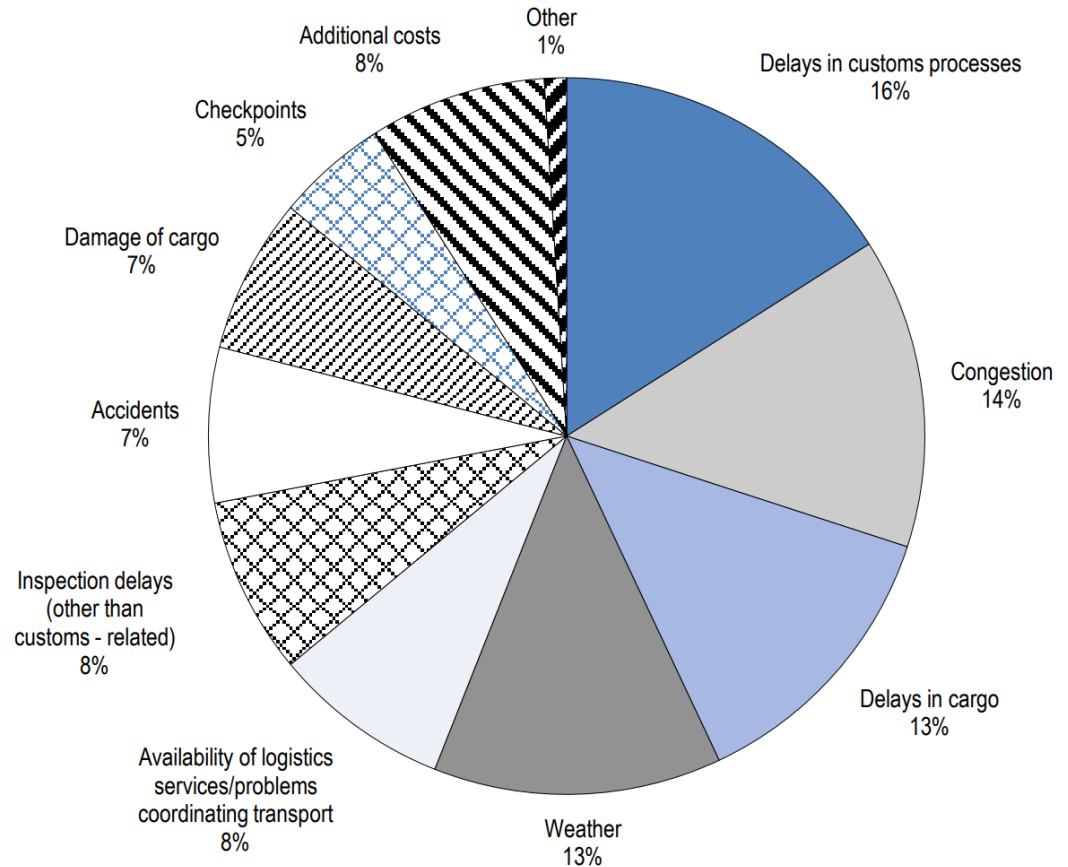


High Shipping Cost

Cost Comparison with Selected ASEAN Countries



Other Logistic Issues in Philippines



Cargo Truck Regulations

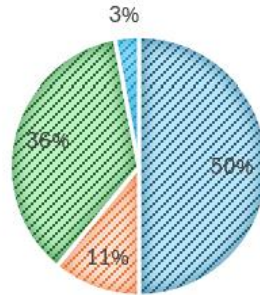
- Trucks for hire are regulated and provided franchises to operate on certain routes only and need to meet certain technical requirements.
- Maximum age of 15 years
- Cargo weight limits are in place and monitored
- Euro 4 Emission Standards

Energy Efficiency and Conservation Act

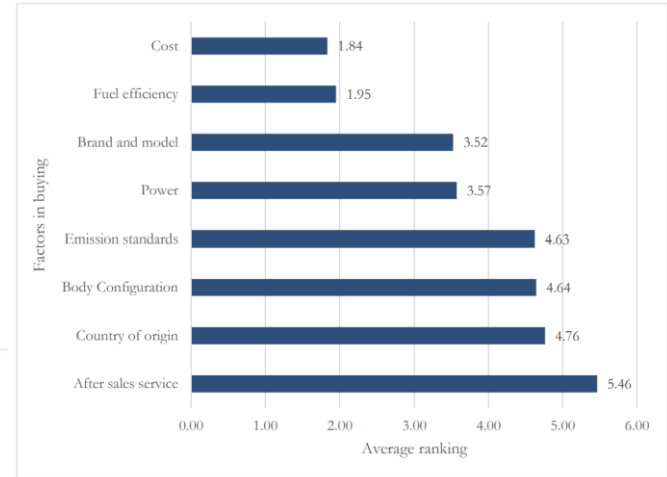
Cargo Truck Profile

EMPTY MILE SHARE

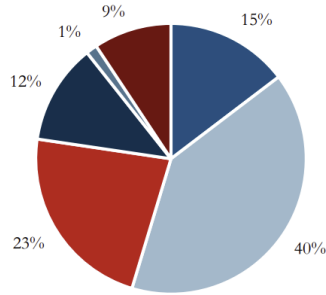
■ 21 to 30% ■ 1 to 10% ■ 11 to 20% ■ No Answer



Selection Criteria

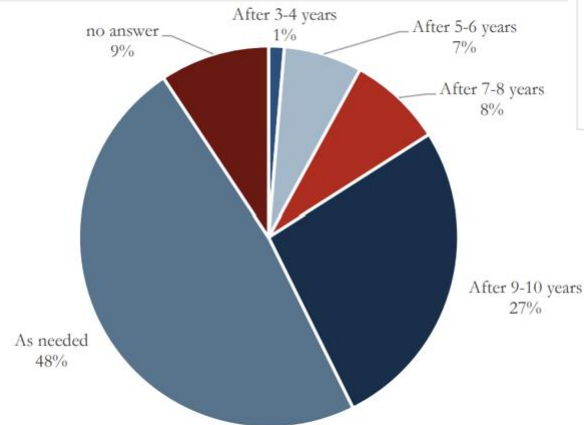


Age Distribution




■ 1-3 years old ■ 4-6 years old ■ 7-10 years old
 ■ 11-15 years old ■ Over 15 years old ■ No answer

Re-fleeting Frequency




Physical Internet





THE OFFICIAL NEWSLETTER OF DE LA SALLE UNIVERSITY
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LA SALLE DRIVES ROADMAP PROJECT FOR PHL LOGISTICS, FREIGHT TRANSPORT SECTOR

DE LA SALLE UNIVERSITY (DLSU), THROUGH THE DLSU ADVANCED RESEARCH INSTITUTE FOR INFORMATICS, COMPUTING AND NETWORKING (ADRIC), ENRIQUE K. RAZON LOGISTICS INSTITUTE (ERLI) AND COLLEGE OF COMPUTER STUDIES (CCS), recently brought together various logistics sector stakeholders in a seminar-workshop led by Department of Science and Technology (DOST) Balik Scientist, Prof. Greg Follente of the University of Melbourne in Australia.

What's inside

GCOE faculty, first Filipino to vie for Queen Mary UK Best PhD in Robotics Award	2
University Fellow, partners push for marine "Hope Spot"	3
Groundbreaking of new marine facility in Lian held	5

Continue on Page 2 >

Key Points

- **Challenges facing the Philippine Logistics are quite varied and complicated**
- **Philippine Logistics is faced with a lot of more pressing challenges such that sustainability has been on the back seat**
- **The Energy Efficiency and Conservation Act could be a main driver for sustainable logistics in the Philippines**
- **Efforts to leverage technology such as PI to address key issues including sustainability are on-going.**

Thank you



Any Questions?





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