

Shifts beyond Globalisation - into The Asian Century



Mark Millar

Author of *Global Supply Chain Ecosystems*

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Shifts beyond Globalisation – into The Asian Century

by [Mark Millar](#), author of [Global Supply Chain Ecosystems](#)

Abstract:

Presentation explores how globalisation seems to have stalled, with developed markets becoming fractured, whilst emerging markets are experiencing rapid growth - particularly in the Asia region;

These macroeconomic shifts are driving a trend towards more regional supply chains, with implications for freight, transport and logistics.

Mark Millar MBA, FCILT, SCOR-P, FHKLA, FCIM, GAICD

Speaker, Moderator, Advisor, Author

Mark Millar leverages over 30 years global business experience to provide value for clients with informed and independent perspectives on their supply chain strategies in Asia.

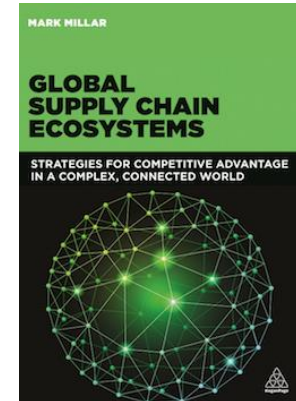
Acknowledged as an engaging presenter who delivers a memorable impact, Mark has completed more than 450 speaking engagements at corporate events, client functions and industry conferences across 28 countries.

A Visiting Lecturer at Hong Kong Polytechnic University, Mark is recognised as one of 'Asia's Top 50 Influencers in Supply Chain and Logistics'; in the USA listing of 'Top Pros-to-Know in Supply Chain' and 'China Supply Chain Top 20'.

Mark's book "[Global Supply Chain Ecosystems](#) strategies for competitive advantage in a complex, connected world" was commissioned by leading business publisher [Kogan Page](#) of London.



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Roadmap:

Shifts beyond Globalisation – into The Asian Century

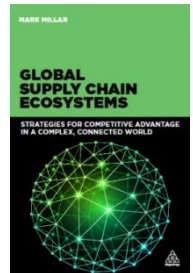
1. Globalisation Shifts
2. The Asian Century
3. Logistics Implications



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Globalisation Shifts

Globalisation Generation – 3 Key Drivers...

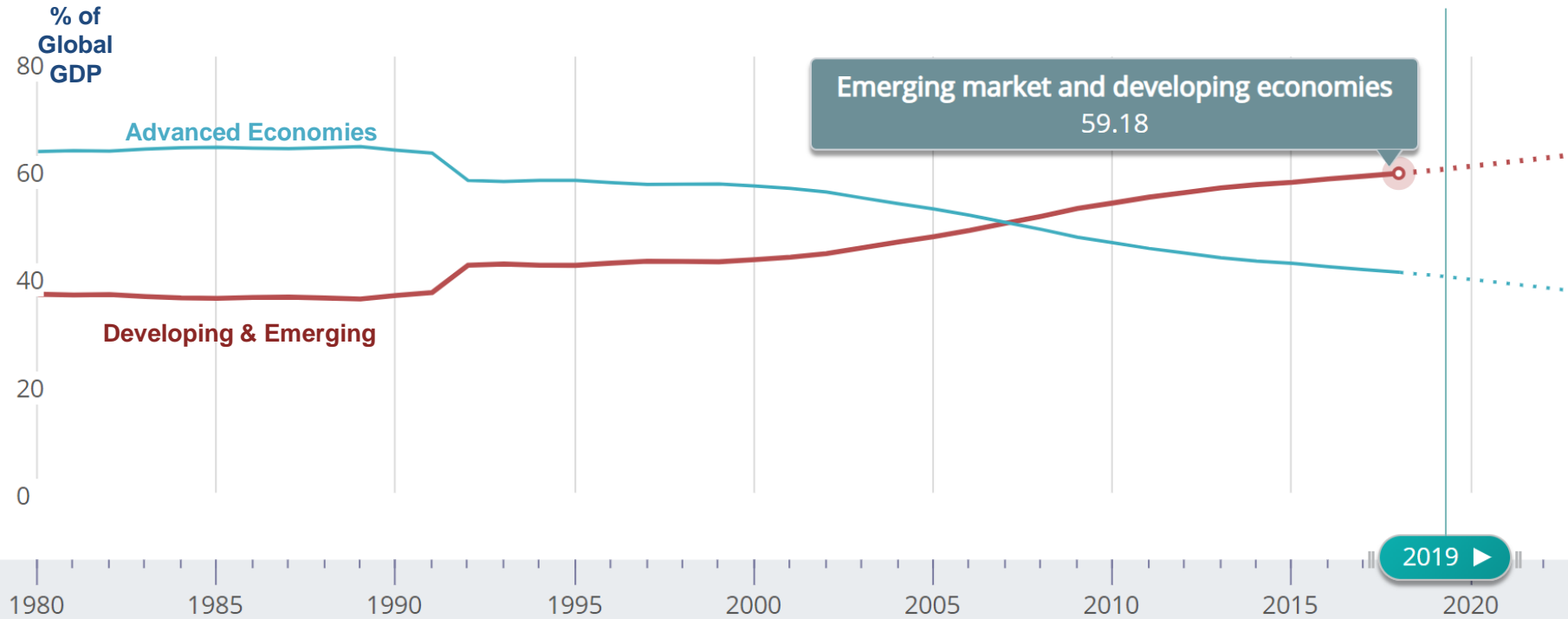
3 decades of Globalisation resulted in today's Global Supply Chains

- Outsourcing: **Who**
- Off Shoring: **Where**
- Un-Bundling: **How**



- Cross-border movement of goods ~40% of global GDP
- One-third of All Goods Produced are traded Cross-border

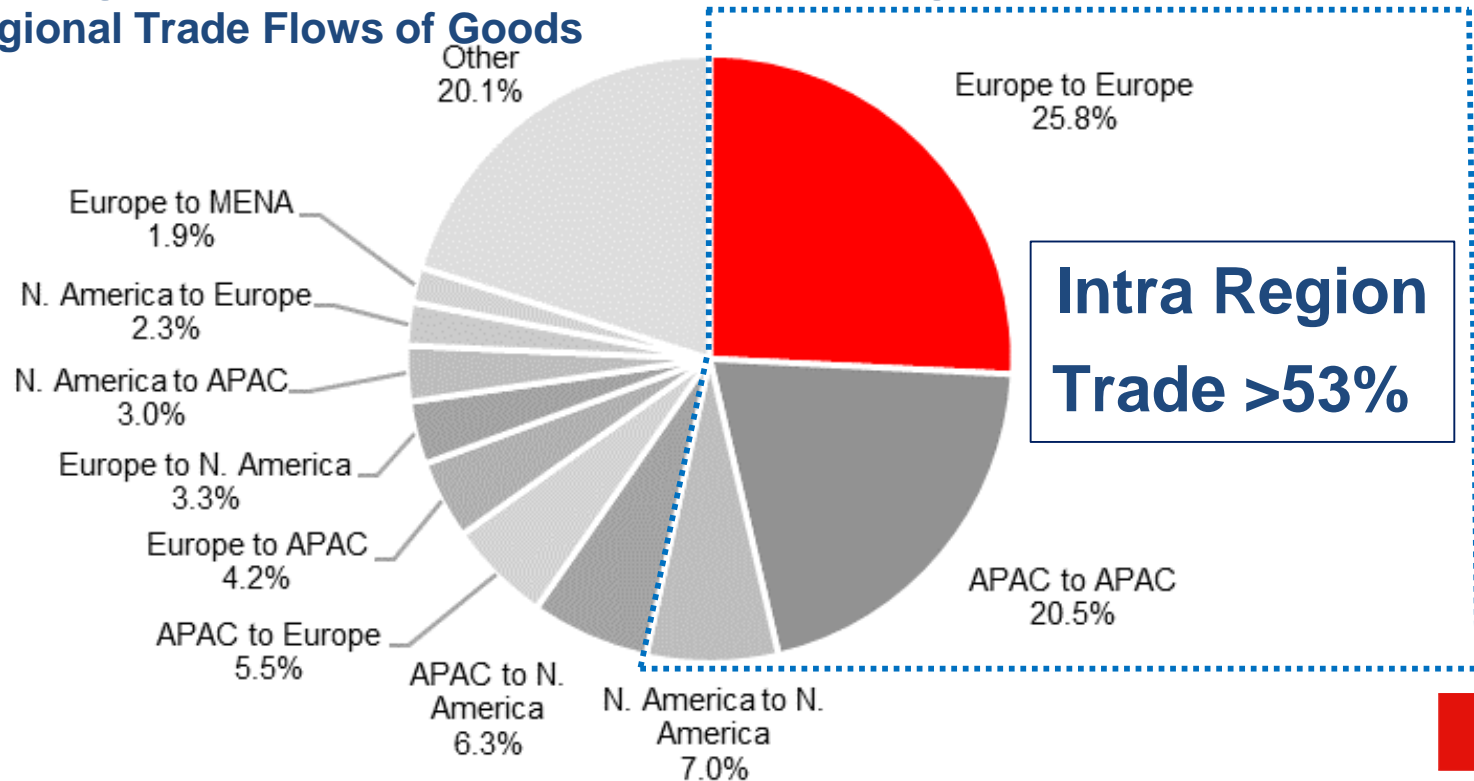
Globalisation: reduces Advanced Economies share of Global GDP, benefits Developing Markets...



Globalisation Stalled?

Increasing Trend towards Intra-Regional Trade

Top 10 Regional Trade Flows of Goods

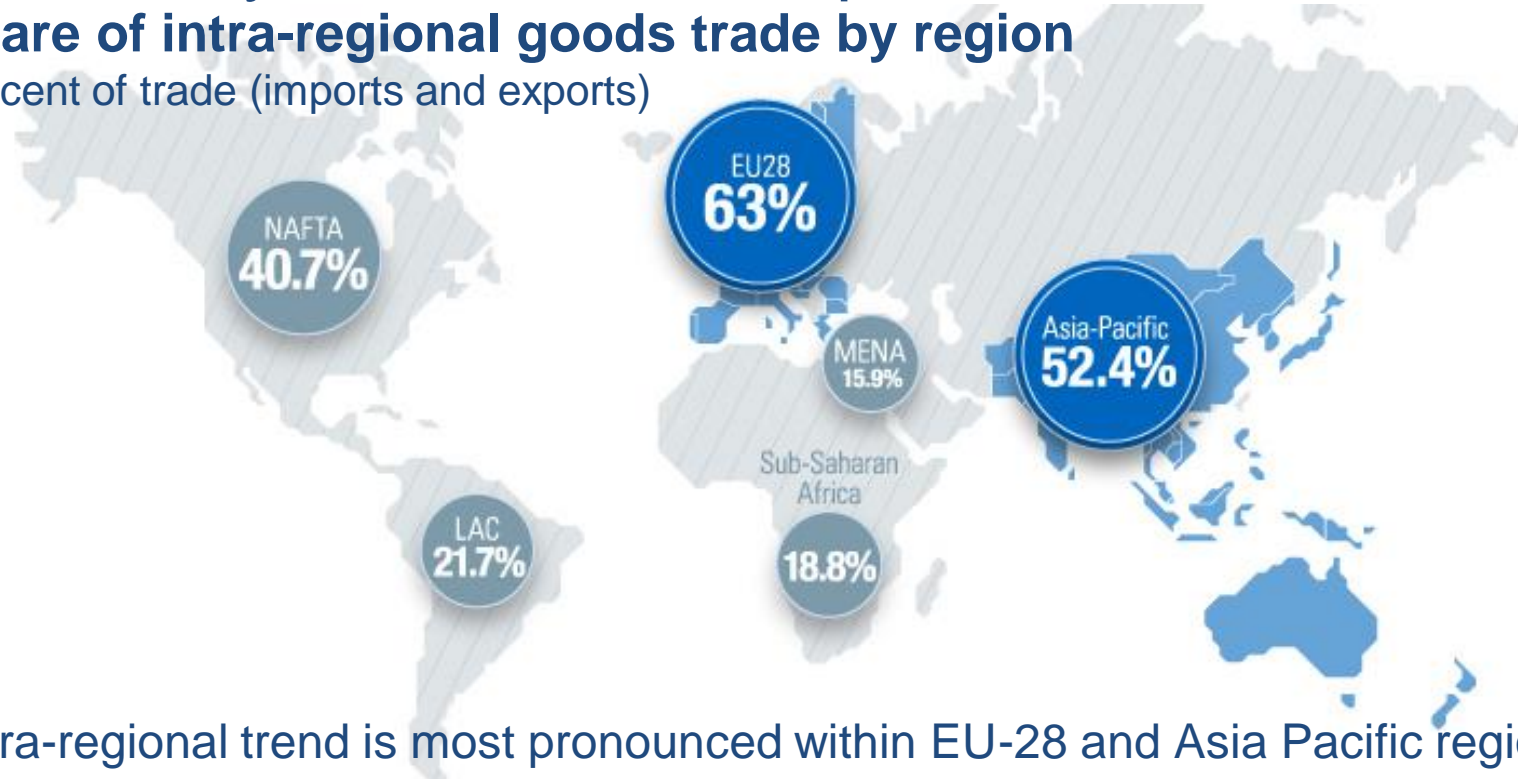


Trade becoming concentrated within Regions

- Proximity to Customers, Speed to Market

Share of intra-regional goods trade by region

Percent of trade (imports and exports)



Intra-regional trend is most pronounced within EU-28 and Asia Pacific regions

Developed Markets Fractured

"Economic Prosperity and Social Cohesion are Not one-and-the-same"



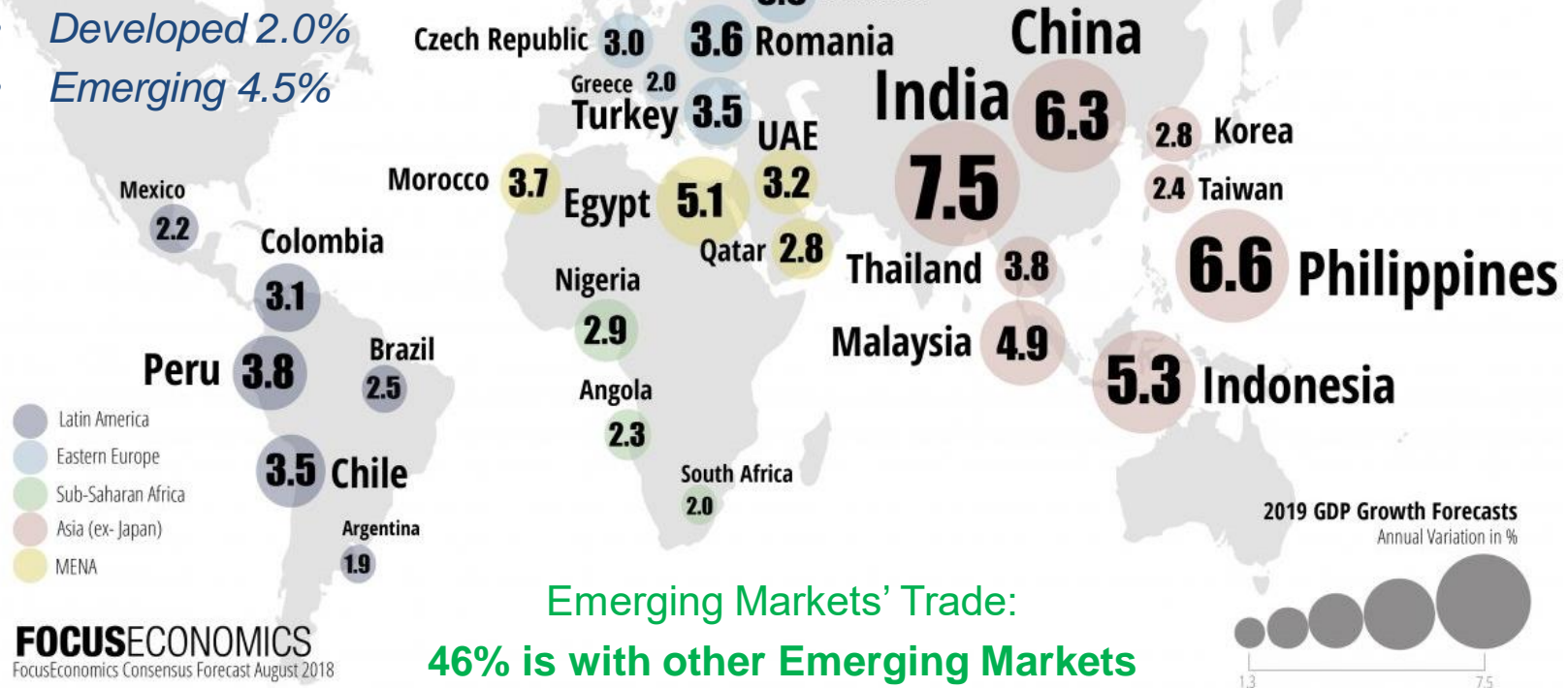
Emerging Markets Developing...

2019 GDP Growth Forecasts

Global 3.5%

- Developed 2.0%
- Emerging 4.5%

Developed Market Exports:
30% go to Emerging Markets



Emerging Markets' Trade:
46% is with other Emerging Markets

Emerging Markets - Top 10 fastest growing

- will dominate global economy in next decade



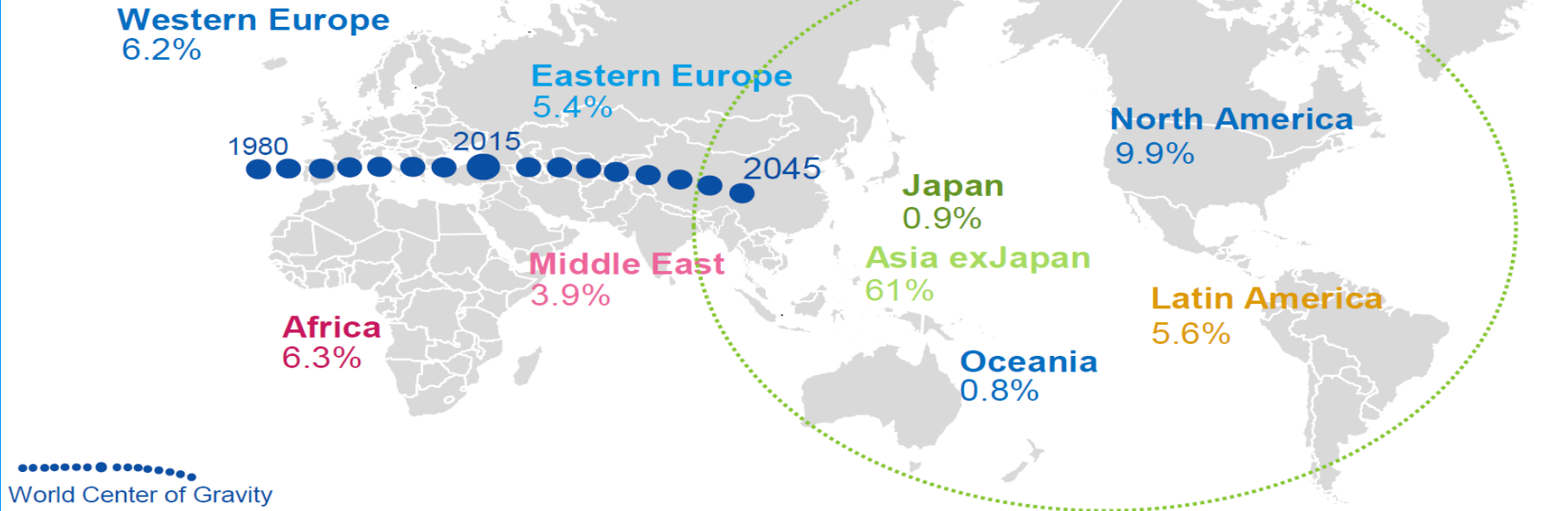
6 of 10 in Asia, including All the top 5

2019-2028 Ten Year		
	Average Annual Growth	
1	India	6.5%
2	Philippines	5.3%
3	Indonesia	5.1%
4	China	5.1%
5	Malaysia	3.8%
6	Turkey	3.0%
7	Thailand	2.9%
8	Chile	2.6%
9	Poland	2.5%
10	South Africa	2.3%

Asia-Centred World

Economic Centre of Gravity continues to shift East

Regional Contribution to World GDP Growth, 2015-2025



Global Growth concentrated in Asia - 61% of GDP Growth 2015 through 2025

Asia: Full Spectrum of Economies, Internal Tensions, Economic Dependencies

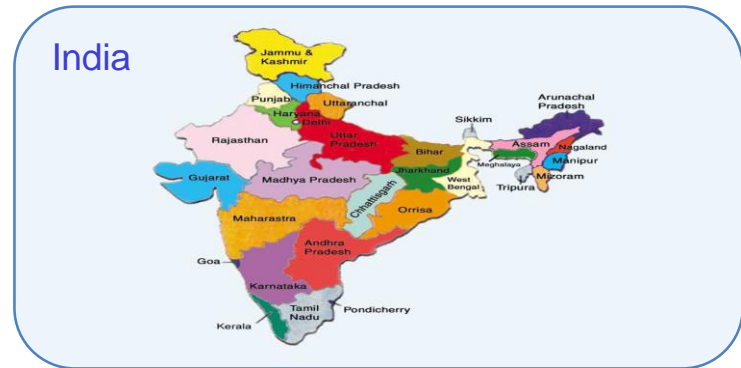
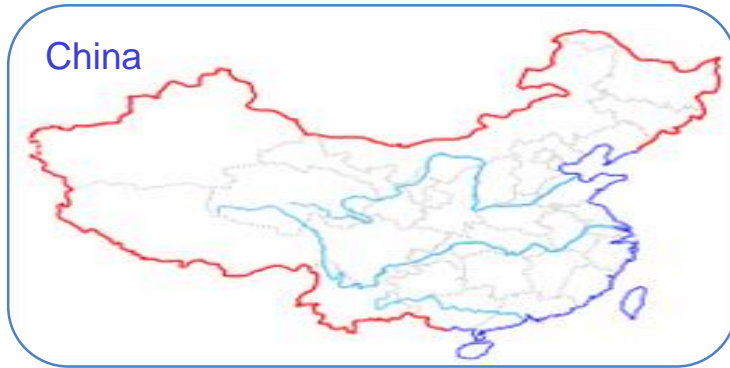
The Asian Century

A world map is shown in a circular projection, centered on the Atlantic Ocean. The map uses a color scheme where landmasses are green and brown, and oceans are dark blue. A circular inset is positioned over the Asian continent, showing a detailed view of Asia with a yellowish background and blue outlines for the landmasses. The text 'The Asian Century' is written in large, white, sans-serif font across the middle of the map, partially overlapping the Americas and Europe. Below the inset, the text 'There are more people living inside this circle than outside of it.' is written in a smaller, white, sans-serif font.

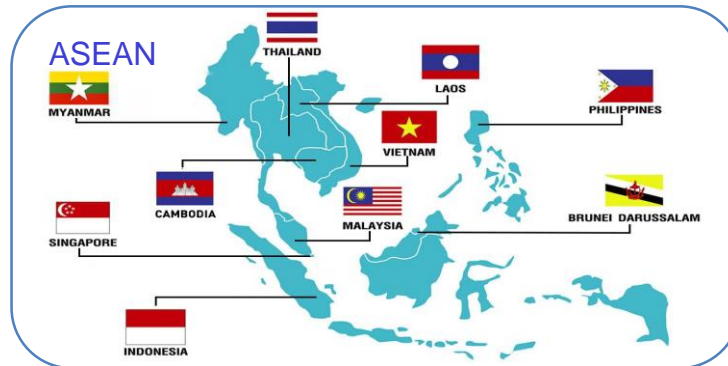
There are more people living inside
this circle than outside of it.

Asia: One Region, but Multiple Markets . .

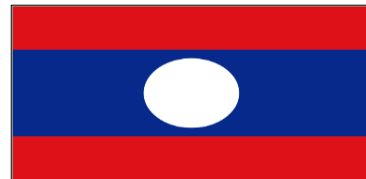
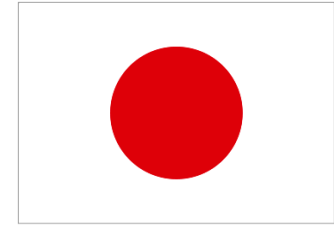
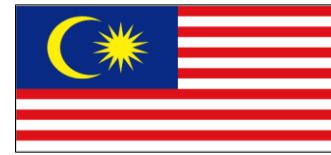
3 mega markets comprise ~ 3,000,000,000 people...



2030
China + India
= 35% global
population



Asia: One Region, Multiple Markets . .



The Asian Century

– smorgasbord of trade initiatives

1. AEC
2. CPTPP
3. RCEP
4. FTAAP
5. BRI
6. GBA



AEC: ASEAN Economic Community



AEC established 2015

10 ASEAN Countries (1967)

\$2.5 trn GDP

Avg Growth >5%pa

630m Consumers

Median Age 28.9 years



CPTPP: Comprehensive Progressive Trans-Pacific Partnership



2018 ratified

11 Countries

(USA withdrawn)

500m Consumers

\$15.5 trn GDP

13.5% Global GDP

15% World Trade

RCEP: Regional Comprehensive Economic Partnership

- ASEAN 10

1.  [Brunei](#)
2.  [Cambodia](#)
3.  [Indonesia](#)
4.  [Laos](#)
5.  [Malaysia](#)
6.  [Myanmar](#)
7.  [Philippines](#)
8.  [Singapore](#)
9.  [Thailand](#)
10.  [Vietnam](#)

- plus six

11.  [Australia](#)
12.  [China](#)
13.  [India](#)
14.  [Japan](#)
15.  [South Korea](#)
16.  [New Zealand](#)



2019 Finalise??

16 Countries

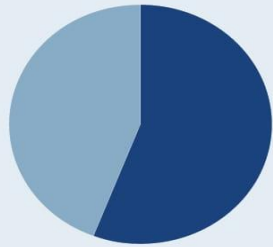
ASEAN + 6

3.6 bn people

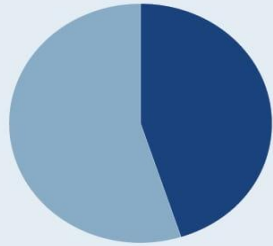
\$25 trn GDP

>40% Global
Economy

FTAAP: Free Trade Area of the Asia-Pacific (21)



56 %
of global GDP
(\$ 42 trillion)



45 %
of world trade
(\$ 10.6 trillion)



39 % of world's population
(2.8 billion)



BRI: Belt & Road Initiative



2013 Xi Jinping

60+ countries

40% global GDP

65% world's population

Beijing promotes as
boosting regional
cooperation and
connectivity, through
infrastructure investment

\$460bn investment to date

GBA: Greater Bay Area



2019 Beijing Master Plan

11 cities: 9 Guangdong +
Hong Kong + Macau

Integrated Economic and
Business Hub

66m population

\$2 trillion GDP

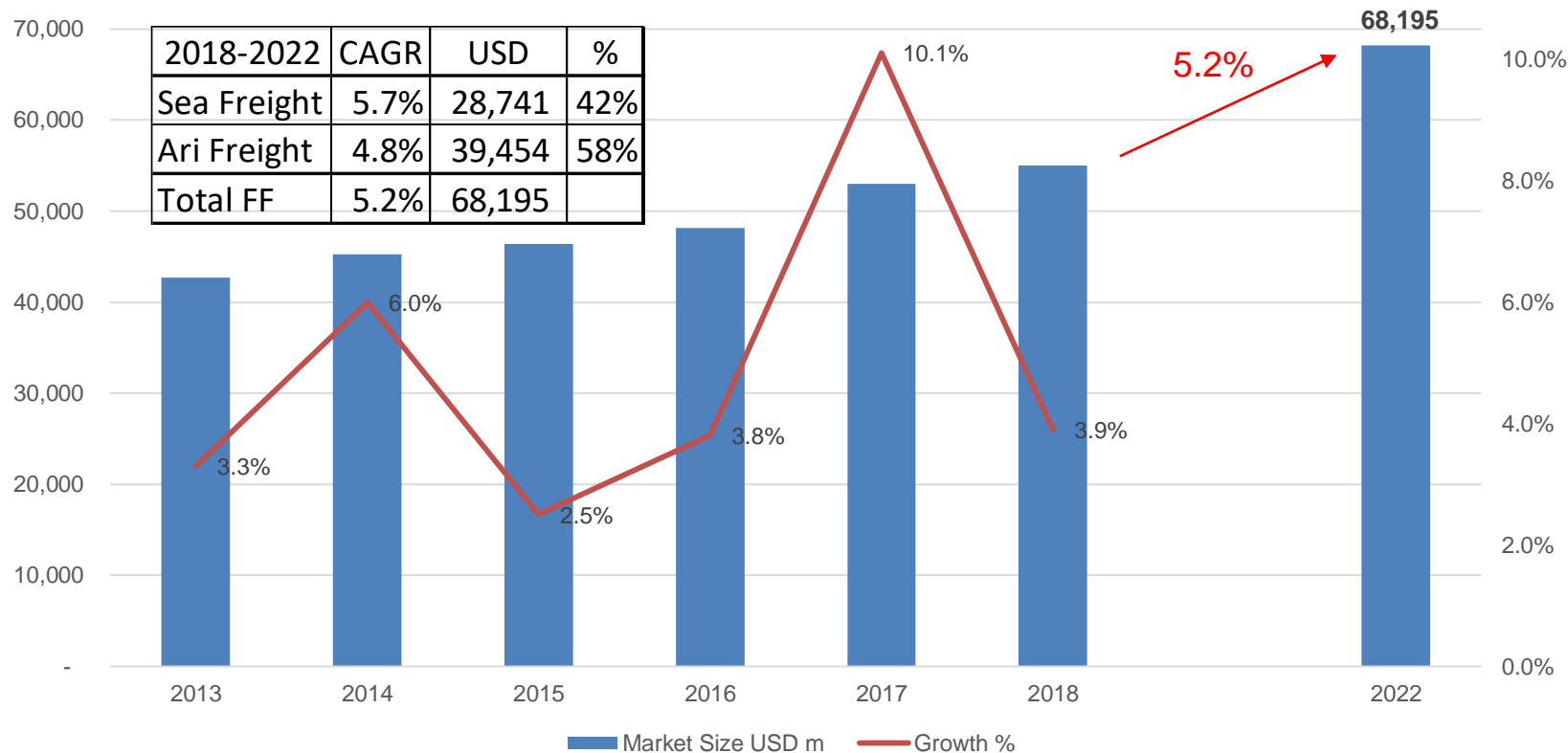


Logistics Implications

- 
- The background image is an aerial view of a city at sunset, with a complex network of white lines and icons overlaid. The icons include a globe, a speech bubble, an envelope, a share symbol, a laptop, an '@' symbol, a person, a location pin, a smartphone, a cloud, a Wi-Fi symbol, and an airplane. The lines connect these icons, suggesting a global network or supply chain.
1. Asia Freight Forwarding
 2. Regional Supply Chains
 3. Ground Networks
 4. City Logistics

Asia Pacific Freight Forwarding Market

2013-2022, USDm



Regional Trade drives Regional Supply Chains



Regional Supply Chains

Shorter Distance

Lower Cost

Easier to Manage

Proximity to Market

Responsiveness

Reduces Risks

Freight Implications

More Moves

Fewer Miles

Modal Shifts

Freight Transport Networks

- Ground-based logistics solutions

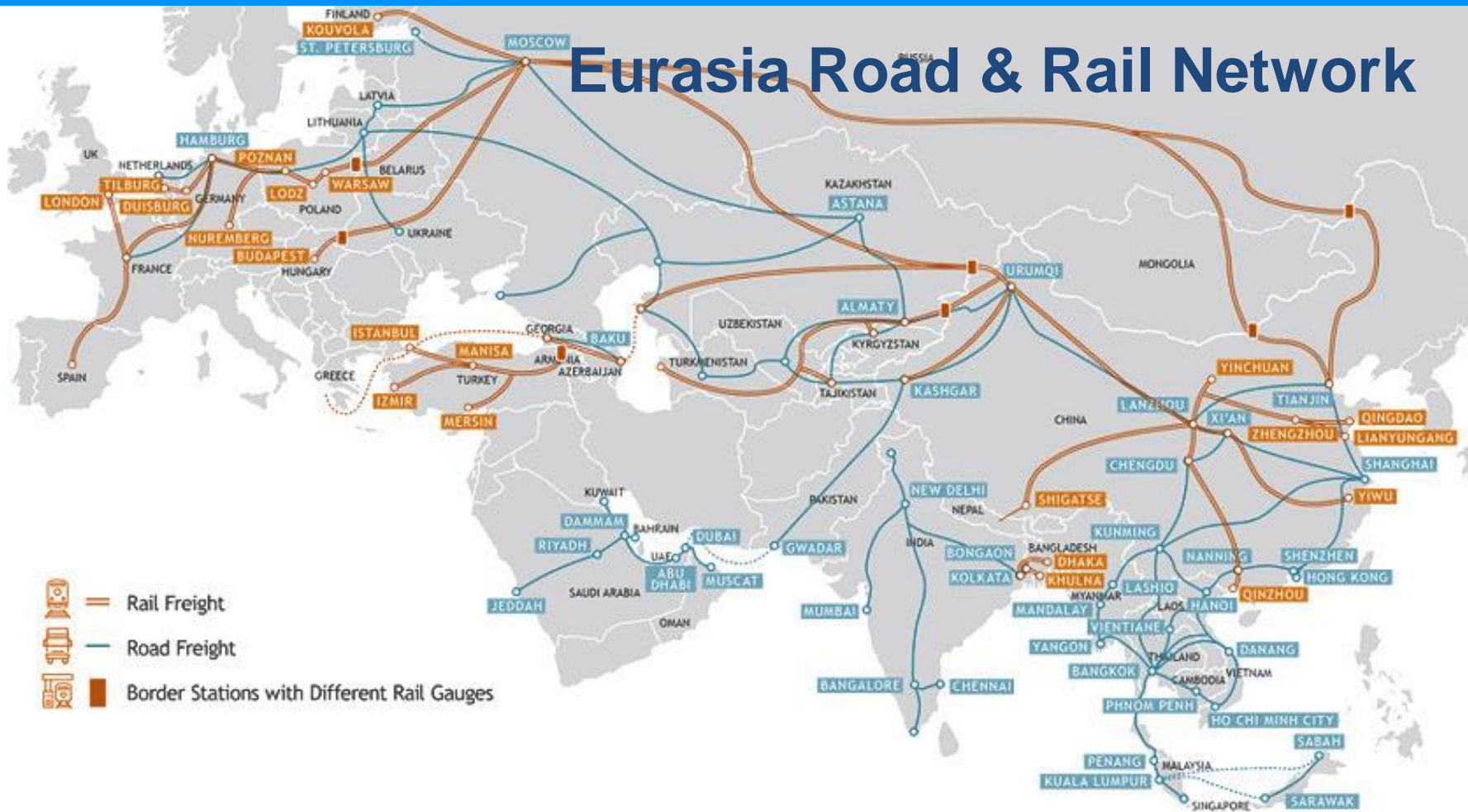


Asian Century Freight Transport Networks

Region invests USD 880 bn pa on Infrastructure



Eurasia Road & Rail Network

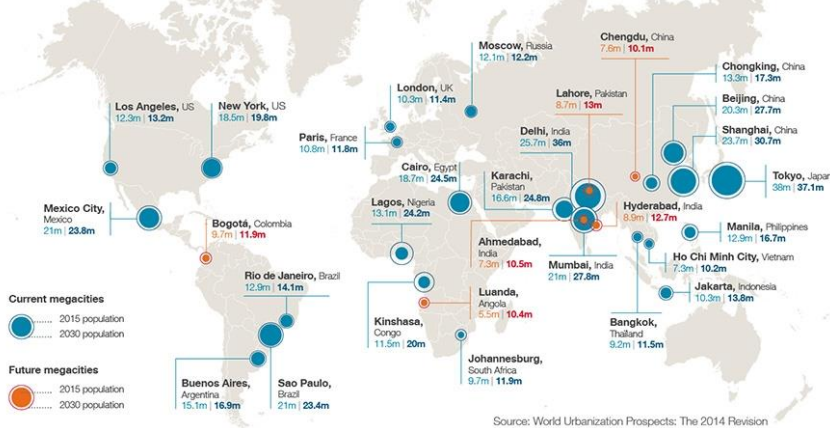


City Clusters

Populations Concentrating in Mega Cities

Leading Economies pursuing Smart Cities

CURRENT AND FUTURE MEGACITIES
2015 - 2030

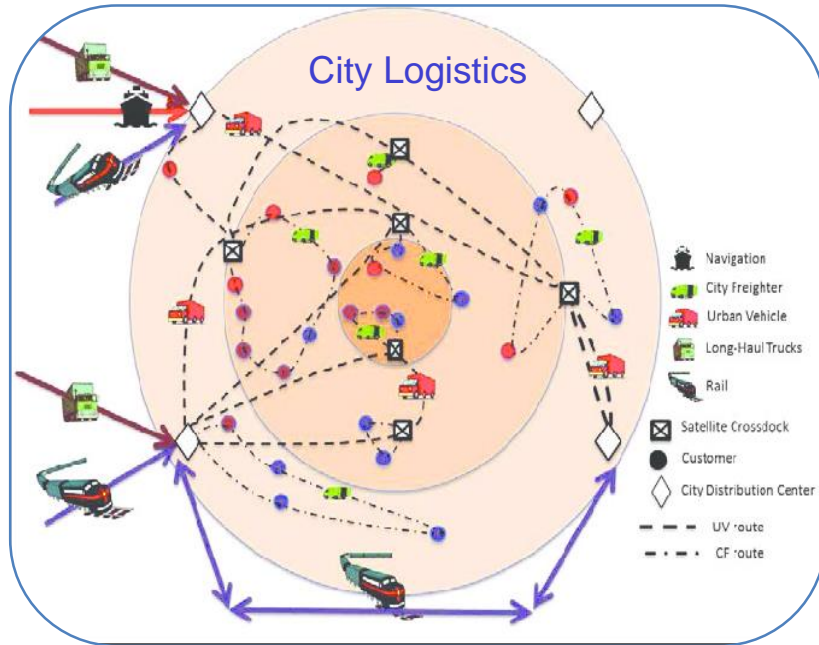


Scale and Density, Technology and Sustainability

- will drive new *City-Centric* business models for downtown distribution

City Centric Logistics Networks

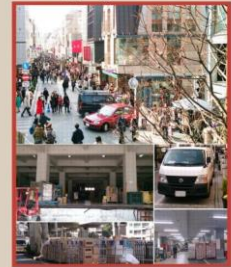
- new models for efficient urban downtown distribution
- *optimise both Distribution and Liveability*



City Logistics:

- Congestion, Pollution
- Access Restrictions
- Electric Vehicles
- Mandatory Milk Runs
- Back Haul Utilisation
- Sensors & IoT
- Cloud Connectivity
- Sharing Economy

City Logistics Mapping The Future



The Asian Century, Emerging Market Logistics

Three Key Challenges:

1



2



3



Competitive Advantage?

- three key sources

1 Knowledge



2 Networks

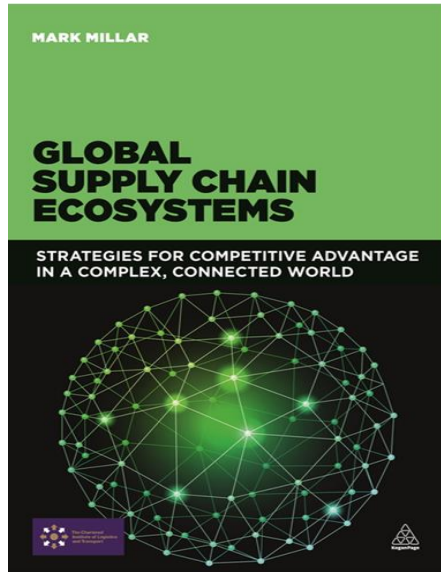


3 Reputation



Global Supply Chain Ecosystems - strategies for competitive advantage in a complex, connected world - by [Mark Millar](#)

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Global Supply Chain Ecosystems

Table of Contents:

- Chapter 1 – Global supply chain ecosystems
- Chapter 2 – Supply chain visibility
- Chapter 3 – Sustainability and green supply chains
- Chapter 4 – Risk and supply chain resilience
- Chapter 5 – Free trade for all – navigating the FTA landscape
- Chapter 6 – The Asian Era – the workers become the shoppers
- Chapter 7 – The New Silk Road connecting Europe and Asia
- Chapter 8 – Integrated logistics – empowers the ecosystem
- Chapter 9 – Human Capital – the talent pool
- Chapter 10 – Omni-channel supply chains
- Chapter 11 – Africa – is it the next Asia?
- Chapter 12 – Supply chain innovation

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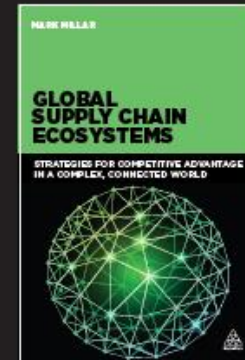


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Mark's book, **Global Supply Chain Ecosystems**, is available at
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