

Changing Tides

Progress and Possibilities for Asia-Pacific's Ports

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Asian Transport Observatory

AIIB Transport Knowledge Week

Ports for Tomorrow: Green, Smart, and Connected

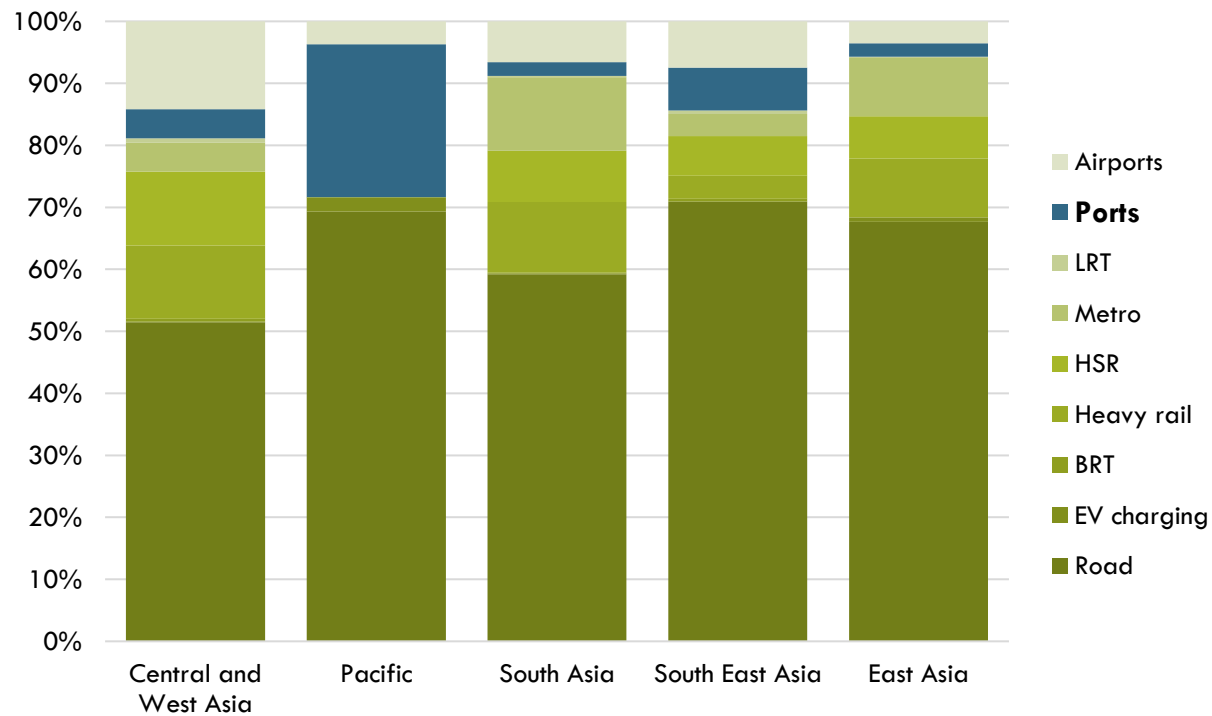
September 14-18, 2026



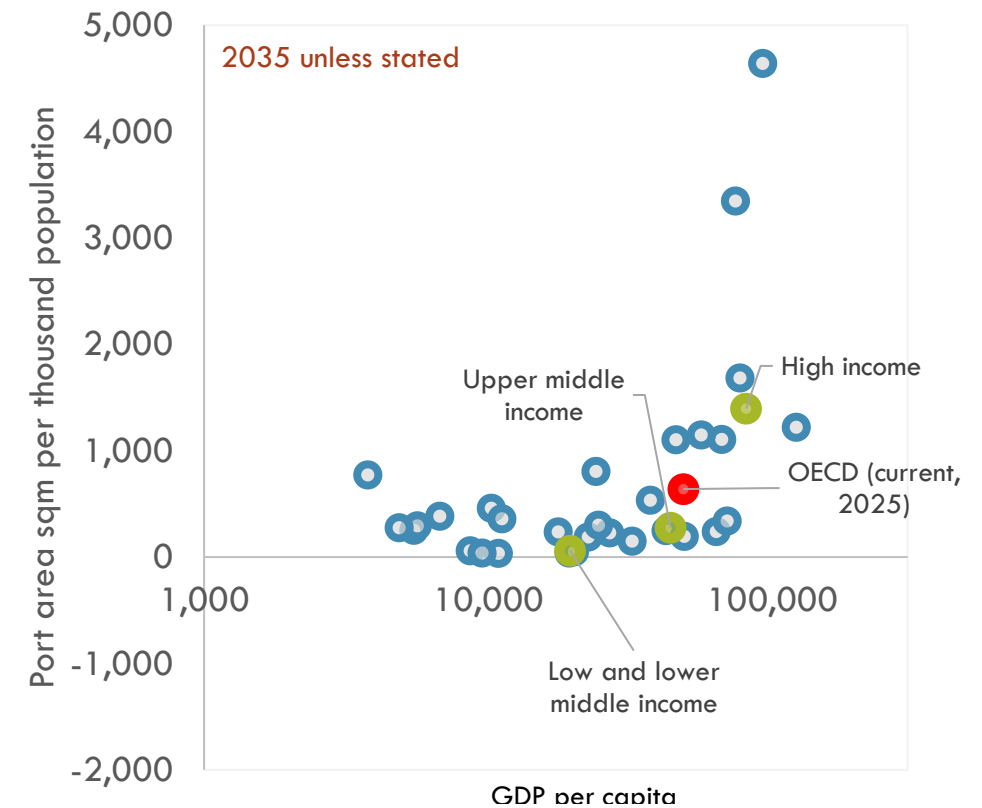
Port Infrastructure and Investment Gap

Port infrastructure gaps remain wide. For Asia, investment needs for port expansion estimated at 70 billion per year.

Transport infrastructure investment, share by mode (%) 2025-2035



Port Area (Asia vs OECD)



Asia's Port Connectivity Gap

Low port connectivity dominates across the Asian economies, with strong connections concentrated in a few country pairs.

86%

Low connectivity

China — Bahrain
 Singapore — Pakistan
 Indonesia — Bangladesh
 Indonesia — Oman
 Malaysia — Sri Lanka
 Thailand — Israel
 Philippines — Cambodia
 Cambodia — Kuwait
 Brunei — Bahrain
 India — Oman
 Pakistan — Bahrain
 United Arab Emirates — Kuwait
 Kuwait — Oman
 Qatar — Bahrain
 ...

5%

Medium connectivity

Singapore — Indonesia
 Singapore — Malaysia
 Indonesia — Malaysia
 Indonesia — Thailand
 Indonesia — India
 Malaysia — Thailand
 Brunei — India
 India — Saudi Arabia
 Indonesia — Japan
 Malaysia — Japan
 ...

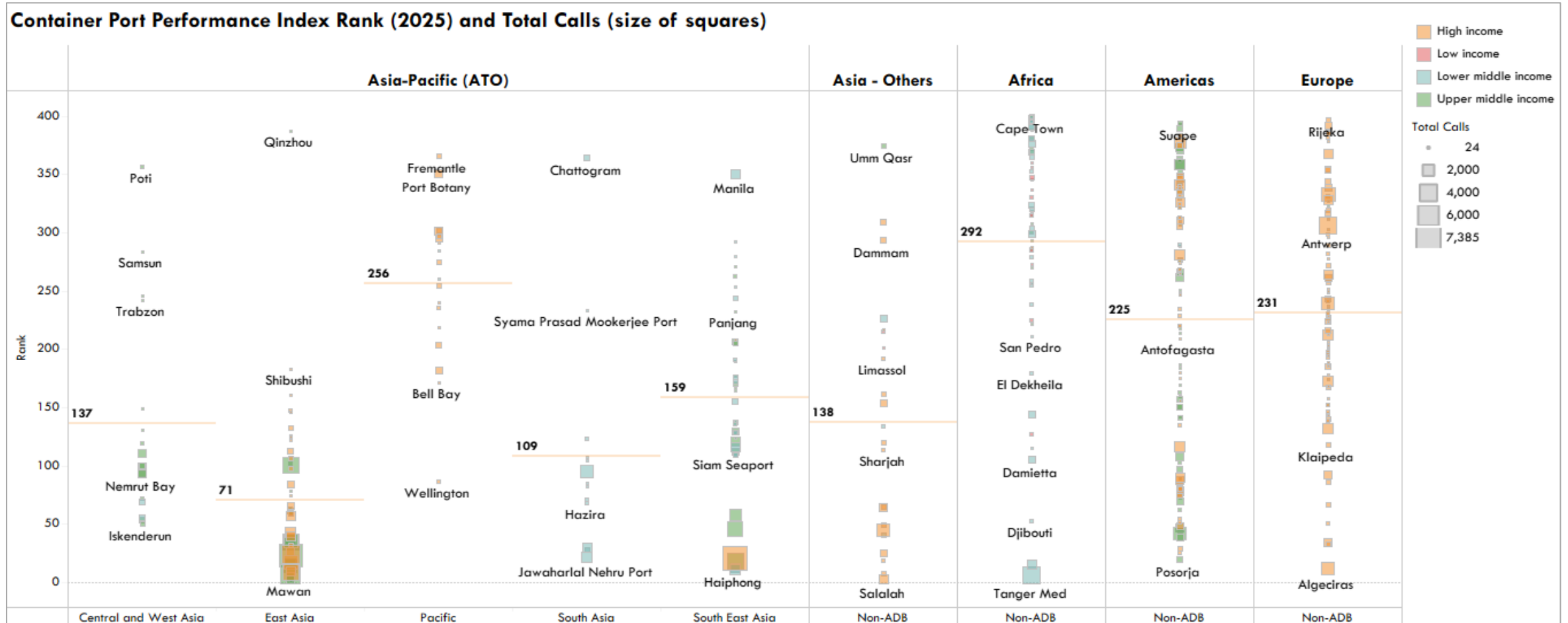
9%

High connectivity

China — Indonesia
 China — Malaysia
 China — Thailand
 China — Philippines
 China — North Korea
 China — Cambodia
 China — Pakistan
 China — Sri Lanka
 China — Bangladesh
 China — Kuwait
 Thailand — Cambodia
 India — Sri Lanka
 ...

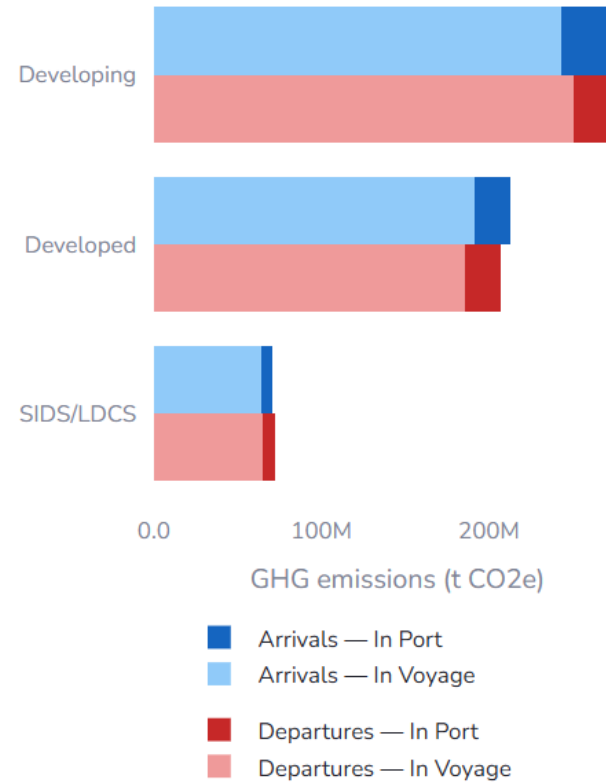
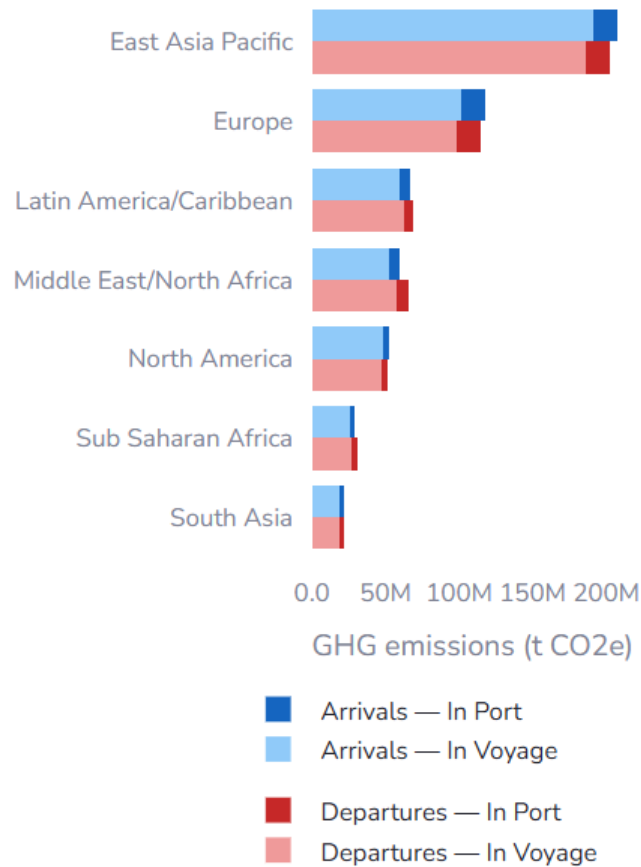
Port Performance

East Asia leads on container port performance; intricate relationships between performance and volumes



Carbon Emissions

Ten percent (10%) of international shipping carbon emissions occur within port areas globally.



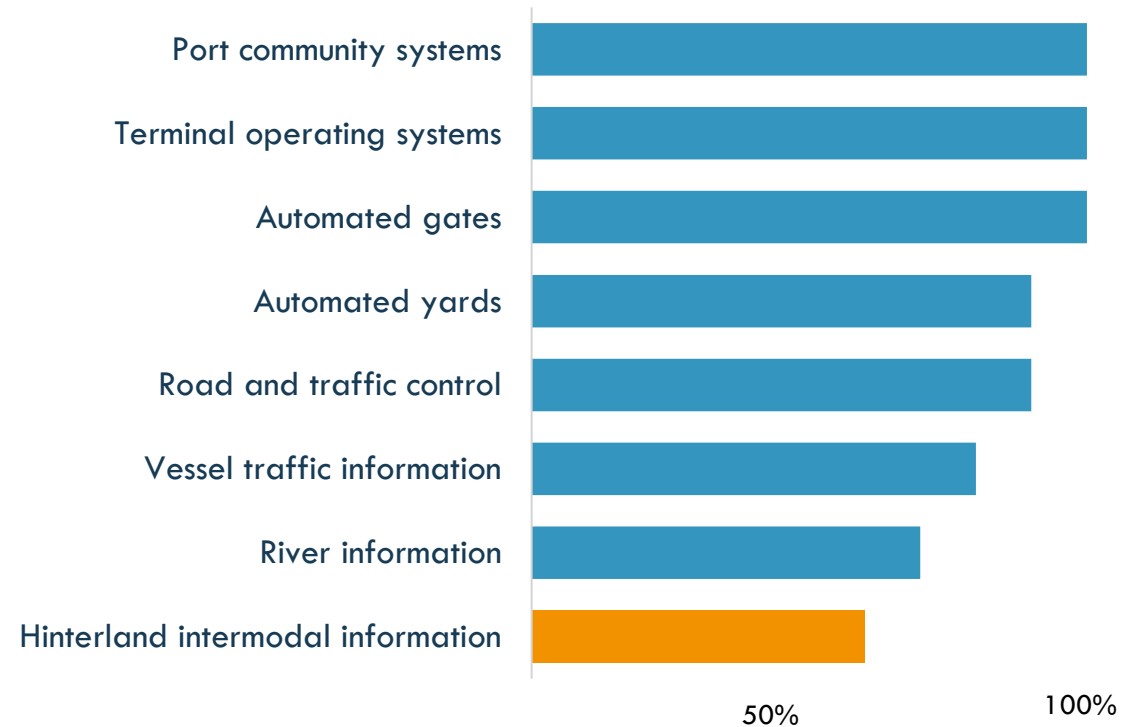
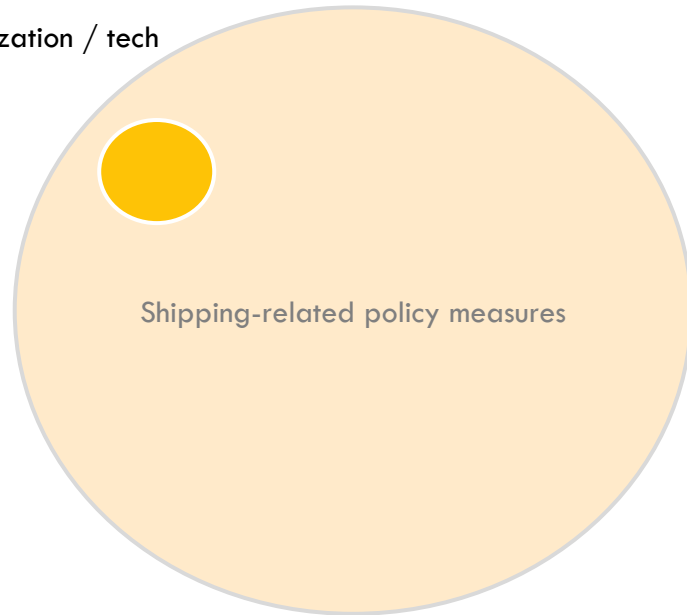
Total international voyages
575.39m t CO₂e

In port
56.82m t CO₂e

SMART-related Policy Measures

Digitalization and technology account for small proportions of tracked shipping-related policy measures.*

3% - digitalization / tech



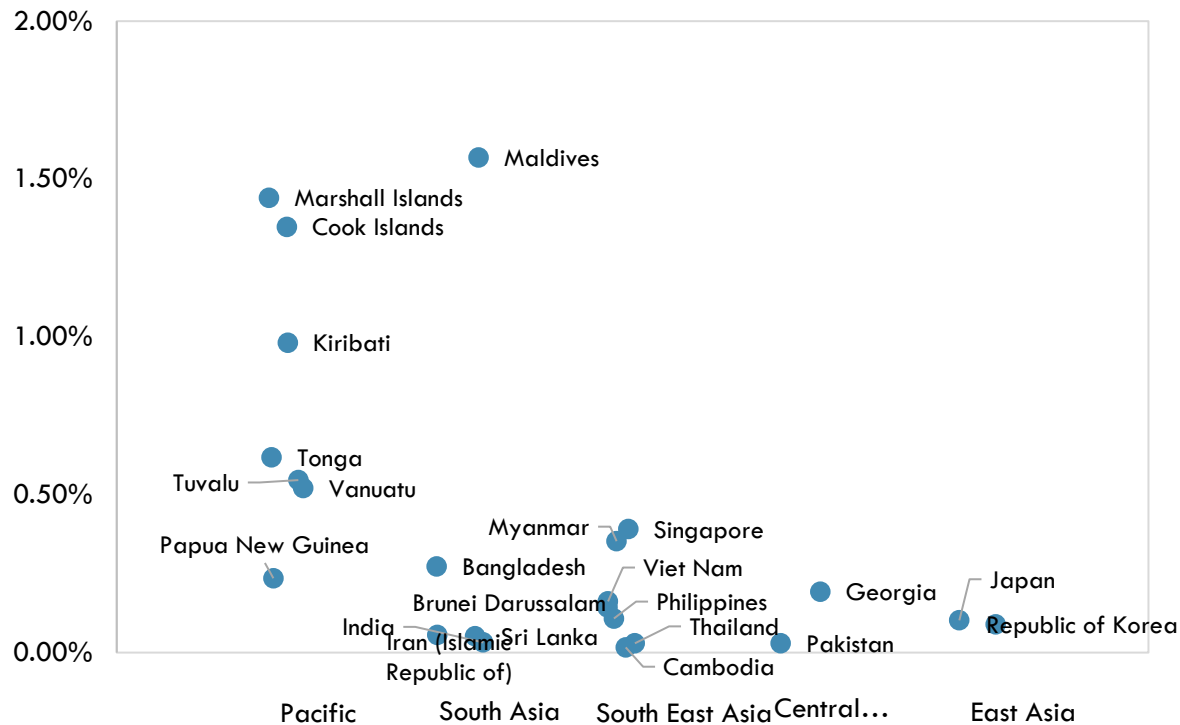
Source: ATO policy tracker ; * Based on policy measures in the ATO policy database

Source: Basulo-Ribeiro et al. (2024), Table 1. Website review conducted in February 2023.

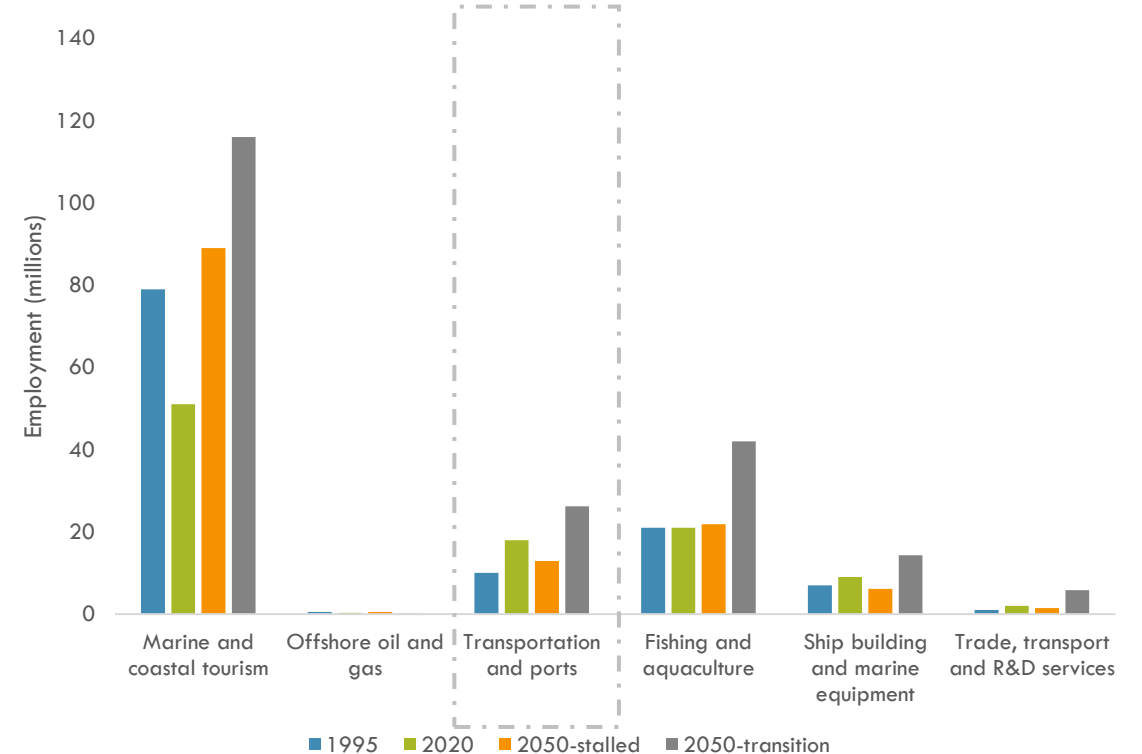
Port Transitions and Employment

Water transport and ports jobs small proportion of total transport employment. Faster global transition to sustainable ocean economy could support substantially employment.

Water Transport as % of Total Transport Employment

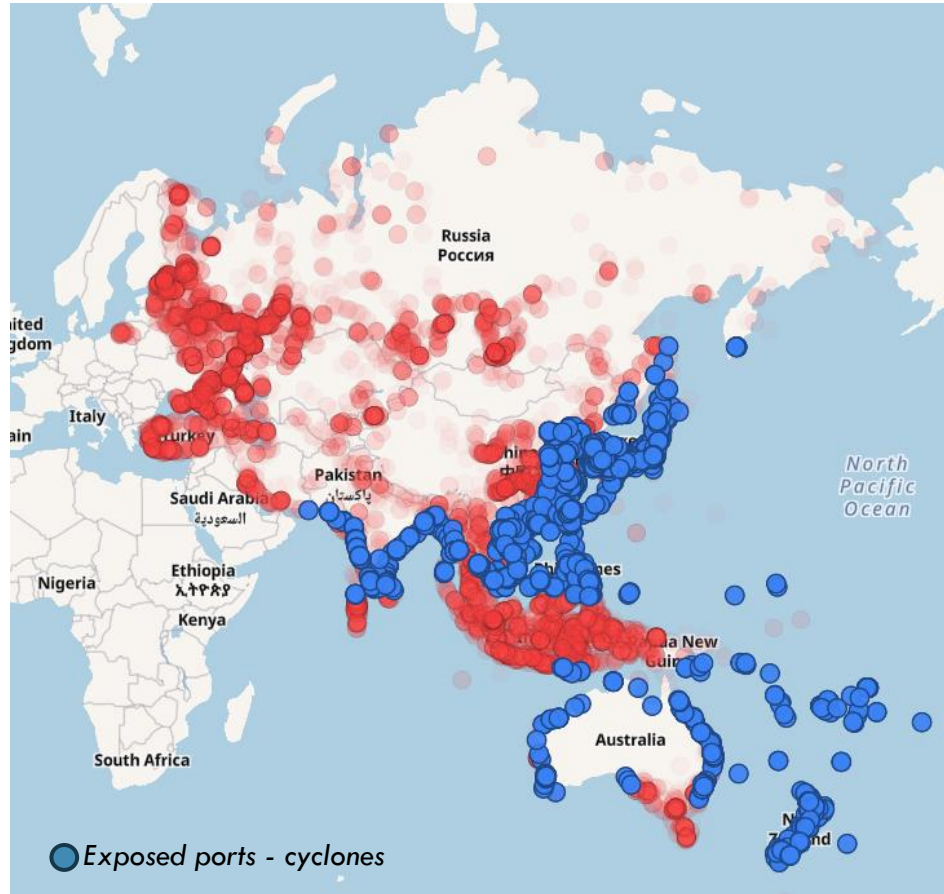


Ocean economy employment in OECD “fast” and “stalled” transition scenarios

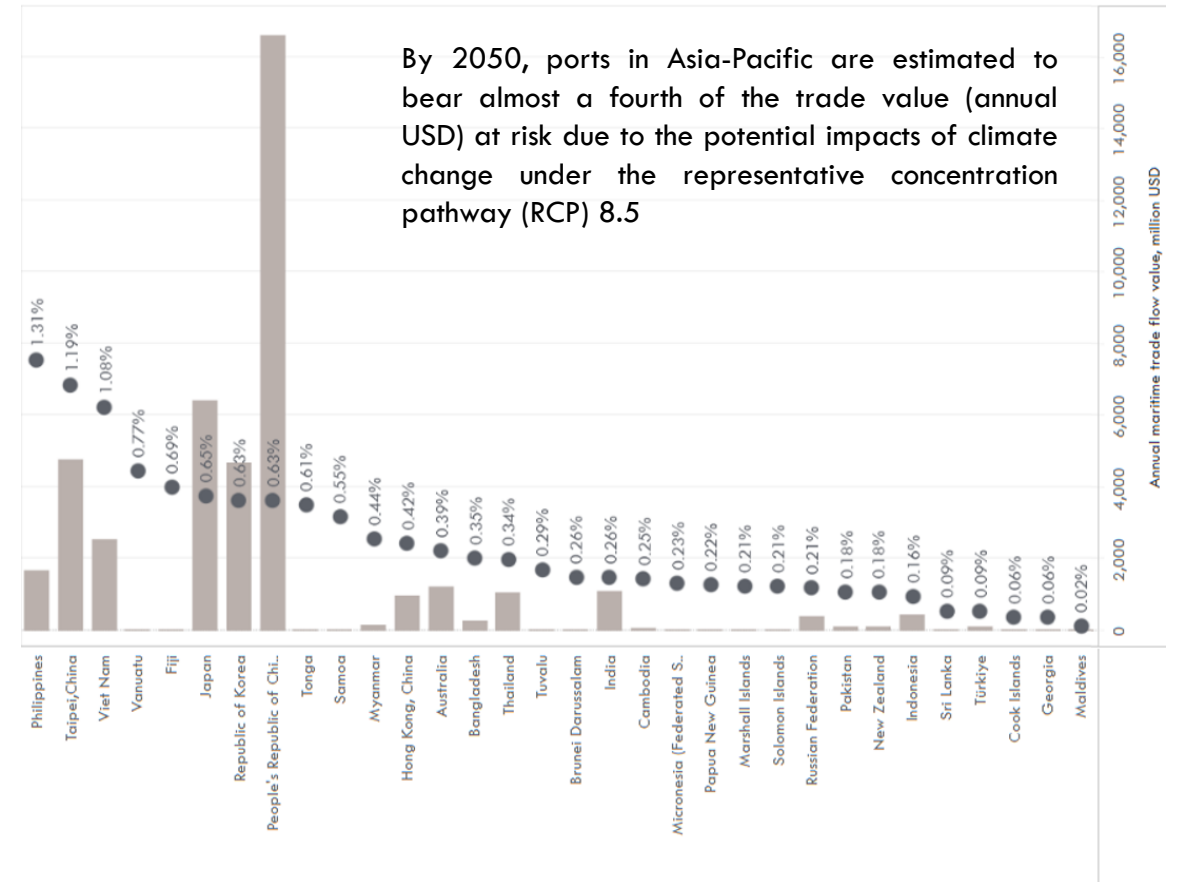


Port Resilience

Climate resilience is critical, not just to the ports per se, but also the global trade, with risks spanning major gateways and small island economies.



Sources: ATO Maritime Profiles



Sources: ATO. Changing Tides: Maritime Transport in Asia Pacific - Asian Transport Observatory. 2025.

Changing Tides: Maritime Transport in Asia-Pacific



Report



Profiles



- Bangladesh
- China, People's Republic of
- Georgia
- Kiribati
- Myanmar
- Papua New Guinea
- Singapore
- Thailand
- Vanuatu
- Brunei Darussalam
- Cook Islands
- India
- Malaysia
- Pakistan
- Philippines
- Solomon Islands
- Timor-Leste
- Viet Nam
- Cambodia
- Fiji
- Indonesia
- Maldives
- Palau
- Samoa
- Sri Lanka
- Tonga
- Türkiye

asiantransportobservatory.org

***“ATO translates data into
insights, policies, and
investments”***

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