



THE WAY FORWARD

# GEMADEPT NEWS

*"Docking for Information"*

January 2026



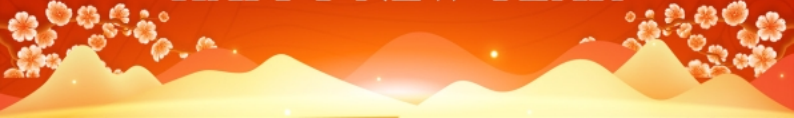
**36**

YEARS

1990 - 2026  
ANNIVERSARY



**HAPPY NEW YEAR**



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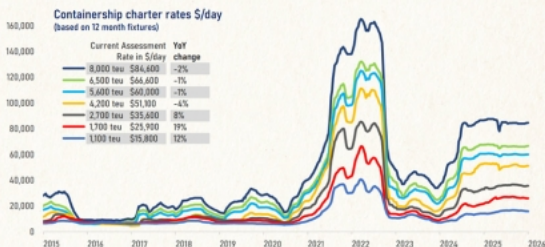
MICRO-FULFILLMENT & DARK STORES – A NEW LINK IN URBAN LOGISTICS



## MARITIME MARKET UPDATES

The global containership fleet has grown by 7.0% year on year, surpassing 7,100 ships for 33.5m TEU as at 1 January 2026. A total of 260 ships for 2.1m TEU were delivered in 2025, against just 21 ships for 17,000 TEU that were deleted last year of which 15 ships were scrapped, 5 ships were sunk and 1 was acquired for military use. A record number of 671 ships for 5.3m TEU were ordered in 2025 with the orderbook rising to an all time high of 11.7m TEU or 34.9% of the current fleet.

Charter market fundamentals remain firm at the start of 2026 especially for larger vessels above 4,000 teu where near-term availability is extremely limited and carriers are increasingly pushed to commit to forward positions that now stretches into 2027. There is more liquidity in the smaller sizes where open units are starting to show up and charter rates are showing some weakness.



Return to Suez have negligible impact on Cape diversions for now

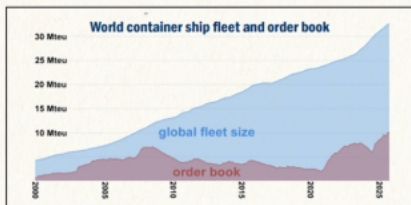
The time-table for a full return to the Suez remains clouded as the current unrest in Iran could trigger an escalation in Middle East tensions that would delay rather than hasten a return of containerships to the Red Sea.





## 2000-2025: LOOKING BACK AT THE MILLENNIUM'S FIRST QUARTER

Within the time of one ship's commercial life, about 25 years, the once modest container fleet has ballooned from 4.5 Mteu to 33.6 Mteu today.



Fuelled by the rise of integrated multimodal supply chains and just-in-time deliveries, strong growth of the world population and a rising middle class, as well as by the offshoring of industrial production on a global scale, the container sector has reached a truly massive scale. China joining the WTO in 2001 and becoming 'the world's factory' played a major role in these developments, leading to massive volume increases on the main East - West trade lanes.

Organic growth and a wave of consolidation in the 2010s have moved a whopping 84% of global ship capacity into the hands of the top-10 carriers, compared to 61% at the start of the millennium. Despite the tremendous growth, the sector's momentum has even increased. Today, the largest ever fleet meets the largest ever orderbook, with close to 11 Mteu of new vessel capacity contracted - again mainly by the top-10 liners.



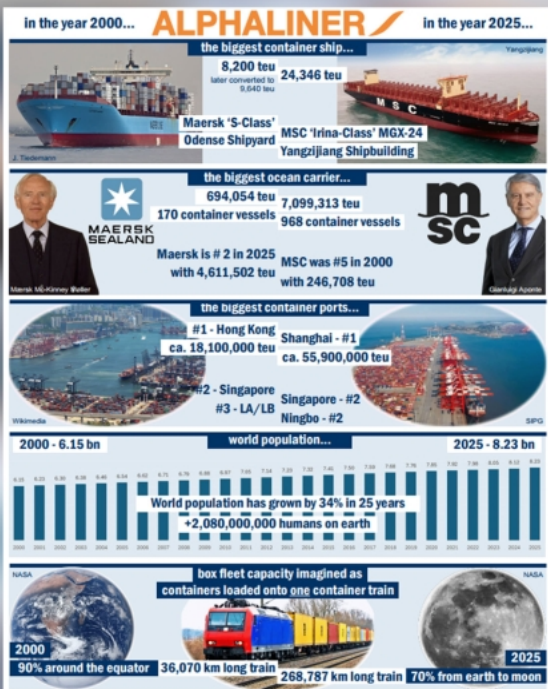
### World boxship fleet grows sevenfold from 2020 to 2025

From a very modest size of just 4.51 Mteu at the turn of the millennium, the global container ship fleet has grown to a whopping 33.6Mteu as the year 2025 draws to a close.

Over the same period, the number of ships has seen a net increase from 2,622 to 7,492. Average vessel size therewith went up from ca.1,700 to about 4,500 teu. At close to 11.0 Mteu (the exact number depends upon when some 'orders' are counted as firm), today's newbuilding pipeline alone is more than twice as big as the world fleet was in 2000.



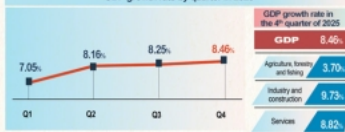
## 2000-2025: LOOKING BACK AT THE MILLENNIUM'S FIRST QUARTER



## INFOGRAPHIC: VIETNAM'S ECONOMIC 2025

### GROSS DOMESTIC PRODUCT

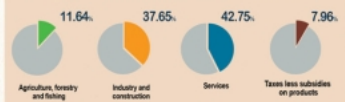
GDP growth rate by quarter in 2025



GDP growth rate in 2025 by economic sector



GDP structure in 2025



### ENTERPRISE REGISTRATION IN 2025 (YoY)

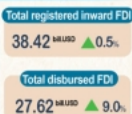


### INVESTMENT (YoY)

Disbursed investment at current prices in 2025



Inward FDI from 1<sup>st</sup> January to 31<sup>st</sup> December 2025



### EXPORT AND IMPORT OF GOODS IN 2025 (YoY)



### PRICE INDEX



# INFOGRAPHIC

## FOREIGN DIRECT INVESTMENT (FDI) ATTRACTION IN 2025

### FOREIGN INVESTMENT

- **Total registered capital:** including newly registered, adjusted, and capital contributions/share purchases, reached USD 38.42 billion, up 0.5% compared to the same period in 2024.
- **Realized project capital** was estimated at USD 27.62 billion, up 9% year-on-year, the highest realized capital in 12 months of the past 5 years.
- **Newly registered capital** reached USD 17.32 billion with 4,054 projects (a 20.1% increase in the number of projects, but an 12.2% decrease in capital).
- **Adjusted registered capital** reached USD 14.07 billion with 1,404 projects, an increase of 0.8% compared to the same period.
- **Capital contributions and share purchases** by foreign investors reached **USD 7.03 billion** across **3,587 transactions**, representing a **54.8% increase** year-on-year..

### INVESTMENT PARTNERS

- Singapore was the largest investor with USD 4.89 billion (accounting for 27.9% of total newly registered capital).
- China ranked second with USD 3.64 billion (accounting for 21%).
- Hong Kong (China) ranked third with USD 1.73 billion, accounting for 10%.
- Followed by Japan with USD 1.62 billion (9.4%), Sweden with USD 1 billion (5.8%), Taiwan with USD 965.8 million, and South Korea with USD 895.9 million.

### IMPORT-EXPORT TURNOVER OF THE FDI SECTOR (INCLUDING CRUDE OIL):

- The FDI sector's export turnover reached USD 34.33 billion, an 11.2% increase month-on-month.
- The FDI sector's import turnover was approximately USD 36.42 billion.
- The FDI sector recorded a trade surplus of USD 30.11 billion.
- The national trade balance reached a surplus of approximately USD 20.05 billion



## VIETNAM'S TOP 10 LOGISTICS EVENTS IN 2025

The year 2025 marks a historic transformation for Vietnam's logistics industry. Below are the top 10 outstanding events selected by the Ministry of Industry and Trade, categorized into four strategic pillars:

### I. STRATEGY & POLICY ORIENTATION

**1. Approval of the Vietnam Logistics Development Strategy 2025–2035:** For the first time, Vietnam has established a dedicated strategy for logistics services through 2035, aiming to become a leading logistics hub in the ASEAN region.

**2. Establishment of Free Trade Zones (FTZ):** Launching FTZ model in **Da Nang (1,881 ha)** and **Hai Phong (6,292 ha)**, creating a breakthrough momentum for the marine economy and international logistics services.

**3 Establishment of Local Logistics Associations:** New associations in **Dong Nai, Hue, and Da Nang**, along with a major merger in Ho Chi Minh City, have strengthened regional connectivity and protected business interests in key economic zones.

### II. CONNECTIVITY & INTERNATIONAL INTEGRATION EVENTS

**4. FIATA World Congress 2025:** Hosted for the first time in Hanoi with over 1,000 delegates from 80 countries and territories, affirming Vietnam's logistics position and resilience on the global map.

**5. Vietnam Logistics Forum (VLF) 2025:** The industry's largest annual event took place in Da Nang, gathering hundreds of experts and enterprises to discuss solutions for "The thriving era"

**6. Vietnam International Logistics Exhibition (VILOG) 2025:** A record-scale event with nearly 480 booths from over 20 countries and territories, showcasing smart technology solutions, warehouse robotics, and advanced cold chain systems.

### III. KEY TRANSPORTATION INFRASTRUCTURE DEVELOPMENT

**7. North-South Expressway Network Completion:** An additional 1,491 km of expressways were completed this year, bringing the total national network to 3,345 km and providing seamless connectivity from Cao Bang to Ca Mau.

**8. Inauguration of Long Thanh International Airport (Phase 1):** The operational launch of this aviation mega-project, with a capacity of 25 million passengers and 1.2 million tons of cargo per year, positions Vietnam as a regional air transit hub.

**9. Groundbreaking of the Lao Cai - Hanoi - Hai Phong Railway:** A strategic step toward realizing "Green Logistics" and optimizing multimodal transport along the East-West corridor and international intermodal routes.

### IV. ENHANCING SEAPORT SYSTEM CAPACITY

**10. Northern Gateway Expansion:** The commencement of operations at **Berths 3, 4, 5, and 6** of Lach Huyen Port has raised the national seaport system's total capacity to approximately **900 million tons per year**. **Future Outlook:** Strategic investment and upgrades continue for other major port projects, including My Thuy, Chan May, Lien Chieu, Can Gio, and Hon Khoai.



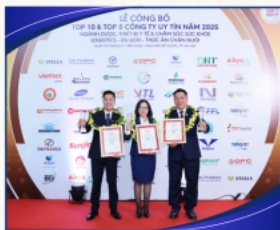


## GEMADEPT NEWS

### 4 ENTITIES NAMED AMONG TOP 10 PRESTIGIOUS LOGISTICS COMPANIES 2025

Recently, Vietnam Report officially announced list of the '**Top 10 Prestigious Logistics Companies 2025**.' With 35 years of pioneering in Vietnam's port operation and logistics sectors, Gemadept Corporation and its subsidiaries continue to secure top positions in this prestigious ranking.

This achievement is a meaningful recognition of Gemadept's persistent efforts in maintaining sustainable growth and developing strategic infrastructure for both Port & Logistics industry and the nation. The fact that Gemadept and 3 awarded members, including Cai Mep Gemadept – Terminal Link Port (Gemalink), Nam Dinh Vu Port, and Saigon Cargo Service Corporation (SCSC) were simultaneously honored in the ranking affirms the important role of the Gemadept ecosystem in national supply chain.



Looking forward 2026, Gemadept is committed to maintaining service quality and further improving the position of its subsidiaries, while striving to bring its Shipping and Inland Waterway Transport sectors into the ranks of leading reputable enterprises in near future.



## GEMALINK RANKING AMONG TOP 3 OUTSTANDING ENTERPRISES IN "VIETNAM ESG INITIATIVE 2025"

Recently, at Vietnam ESG Initiative 2025 Awards Ceremony, Gemadept - Terminal Link Terminal J.S.C. (Gemalink Port), a member of the Gemadept Corporation's Port-Logistics ecosystem, was honored as one of the Top 3 outstanding ESG enterprises.



*Gemalink's representative (second from left) receives the award and recognition trophy at the ceremony*

'Vietnam ESG Initiative 2025' is a prestigious program organized by the Agency for Enterprise Development (Ministry of Finance), the Private Economic Development Research Board (Board IV), in collaboration with Foreign Trade University and the FTU Innovation and Incubation Center (FIIS). The program is part of the framework to support private sector in sustainable business for 2022-2025 period, in accordance with the Prime Minister's Decision No. 167/QĐ-TTg.

The program also receives support from the United Nations Economic and Social Commission for Asia and the Pacific (UN-ESCAP), Catalyse+, and the Green Innovation Vietnam Joint Stock Company (GREEN IN).

Surpassing hundreds of participants, Gemalink successfully impressed the evaluation committee to secure its place in the Top 3 ESG Initiative Enterprises 2025. This recognition serves as a testament to the persistent efforts of both Gemadept and Gemalink in the implementation of Environmental, Social, and Governance (ESG) standards.

Gemalink's proactive implementation of ESG practices not only aimed at complying with increasingly strict Vietnamese and international regulations or meeting the demands of customers and partners, it is also a vital strategy to enhance competitive advantages in global market.



### ENHANCE SAFETY AND SECURITY AT BINH DUONG PORT

Late 2025 and early 2026, Binh Duong Port (BDP) has implemented a series of collaborative activities in order to enhance risk management capabilities and compliance with port-security regulations.

On December 19, 2025, BDP successfully coordinated with relevant agencies including the Dong Nai Maritime Port Authority, Border Guard, Customs, Dong Hoa Ward Police, and the Ho Chi Minh City Center for Disease Control (HCDC) to organize a Port security and information connectivity drill. The drill focused on simulated scenarios for controlling people and vehicles and improving inter-agency information exchange mechanisms, helping to detect and promptly address risks affecting operational safety.

Continuing that effort, Binh Duong Port and the Dong Hoa Ward Police formally signed a 2026 Cooperation Protocol on security. The two parties agreed to strengthen collaboration in maintaining order in the port cluster, strengthening fire prevention and control, ensuring traffic safety, and proactively preventing and proactively combating crime.

Regular drills and periodic cooperation agreements underscore Binh Duong Port's commitment to fostering a safe, seamless business environment. This solid foundation enhances the Port's reputation within the regional logistics chain and supports the Corporation's sustainable development objectives.



## GEMADEPT NEWS

### NAM DINH VU AND NAM HAI ICD GOLIVE GATE ONLINE PAYMENT SYSTEM

December 2025, the **Online Payment** system was successfully commissioned at Nam Dinh Vu Port and Nam Hai ICD, marking a step forward in digital transformation and service-process optimization. The rollout shortens administrative procedures while enhancing transparency and convenience for customers and partners.

#### Key features:

- ✓ Drivers can scan a payment code directly at the inspection area.
- ✓ The system automatically processes transactions and issues invoices at gate-out.





## EXTENDING HOPE IN THE AFTERMATH OF THE FLOODS

The amount of VND 4.5 billion being delivered directly to communities in 2025 represents more than material support—it carries the care and compassion of Gemadept's employees to each Vietnamese central citizens who were severely affected by natural disasters and flooding.



## BRAVING THE FLOODS, BRINGING WARMTH TO REMOTE AREAS

From November 14th to 24th, 2025, Gemadept and HTV's "One Heart" Fund and "Sát cánh cùng gia đình Việt" ("Standing with Vietnamese Families") program, undertook a moving journey across Vietnam. Traversing landslide-scarred routes in Nghệ An, Thừa Thiên Huế, Quảng Ngãi, and Quảng Nam, the team reached displaced households and families who had just survived from the torrent to offer support and encouragement.



## A MORSEL IN NEED IS WORTH A FEAST WHEN FULL

With grants of VND 5 million per household, a total of VND 1.5 billion—contributed by Gemadept employees—has been delivered directly to 300 households across the Central region and the Central Highlands. In communities where ethnic minorities are the majority, even though the name "Gemadept" is still unfamiliar and hard to pronounce, sincerity has become a common language, connecting hearts through tearful eyes and firm handshakes.

## EXTENDING HOPE IN THE AFTERMATH OF THE FLOODS

### A STEADFAST COMMITMENT TO LOCAL LIVELIHOODS

Our journey reached Hàm Thuận and Hàm Liên communes (Lâm Đồng), where many households lost entire coffee and dragon fruit farms—their primary source of livelihood. Gemadept understands that support at this moment is not just material; but a foundation to give the people more motivation to rebuild their lives from the immense losses after the natural disaster.



### THE AMOUNT OF COMPASSION: VND 4.5 BILLION

The charitable journey continued as Gemadept pledged an additional VND 3 billion, raising the total relief budget to VND 4.5 billion. "This is not just a number, but a belief that will continue to reach those in need."

### EXTENDING COMPASSION IN PHÚ YÊN

In the second phase of the relief mission, Gemadept donated VND 3 billion—sourced from the Group Fund and a second round of employee contributions—to support 300 particularly vulnerable households in Phú Yên Province following floods that surpassed historic crest levels, 50 vulnerable residents in Hoa Thịnh (VND 10 million per person), 250 residents—50 each in the communes of Hòa Xuân, Đức Bình, Xuân Phước, Phú Mỹ, and Phú Hòa 2—also received VND 10 million per person.



The 2025 journey of compassion has come to a temporary close, but the spirit of sharing, companionship, and responsibility towards the community will continue to be nurtured and spread in the way forward.

## LOGISTICS TREND

### THE RISE OF ULTRA-FAST DELIVERY:

#### MICRO-FULFILLMENT & DARK STORES – A NEW LINK IN URBAN LOGISTICS

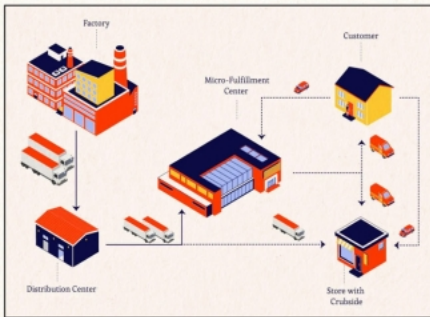
As e-commerce and “same-day delivery” gain momentum—especially in urban areas—two logistics models are capturing global attention: **Micro-Fulfillment Centers (MFCs)** and **Dark Stores**. These are emerging as core solutions to meet the growing demand for **2–4-hour delivery**.

#### CLOSER – FASTER – MORE FLEXIBLE

MFCs are small-scale fulfillment hubs located near residential zones. They leverage robotics, automation, and data management systems to process orders quickly while reducing operating costs. In parallel, Dark Stores are retail spaces repurposed into warehouses exclusively for online orders, without serving walk-in customers.

Both models aim to **shorten last-mile delivery**—which accounts for 40–50% of total logistics costs—while improving service capacity during peak hours. According to Gieicom, these are “strategic weapons” for urban logistics optimization.

#### ACCELERATING GLOBAL ADOPTION



In India, Amazon has announced it is launching up to **two micro-fulfillment centers per day**, enabling deliveries in just **10–30 minutes** through its Amazon Now service (Times of India, 2025). In the UK, retailer B&Q has converted several stores into dark stores, processing hundreds of orders daily—boosting delivery speeds and cutting costs.

These models align with the trend of **urban space reuse**—such as converting basements or compact storage areas—allowing businesses to expand their networks without building large-scale fulfillment centers.

#### NOT JUST CONVENIENT, BUT STRATEGIC

Key benefits of MFCs and Dark Stores include:

- **Accelerated order processing**, especially for Q-commerce (15–30-minute delivery)
- **Inventory and space optimization**, tailored for dense city markets
- **Data-friendly infrastructure**, enabling seamless AI integration for demand forecasting and regional inventory control

However, companies must also consider automation investment costs, suitable space planning, and the complexity of managing decentralized inventory.

#### THE FUTURE OF LOGISTICS IS SHIFTING

According to Emergen Research, the market for last-mile logistics solutions—including MFCs and dark stores—is projected to grow at a **CAGR of over 15%** from 2024 to 2030. This is not just a tech trend, but a fundamental **reshaping of urban supply chains**—where speed, flexibility, and customer connection are becoming key competitive advantages.



**THE WAY FORWARD**



GEMALINK INT'L PORT



PHUOC LONG ICD PORT



BINH DUONG PORT



PACIFIC MARINE EQUIPMENT



BINH DUONG TRANSPORT



GEMADEPT CONSTRUCTION



PACIFIC MARINE CO., LTD.



GEMADEPT CENTRAL



GEMADEPT DUNG QUAT



NAM DINH VU PORT



NAM HAI ICD



GEMADEPT ASL CO., LTD



GEMADEPT PORT SERVICES



PACIFIC STEVEDORING



Mekong Logistics



GEMADEPT ASL CO., LTD



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