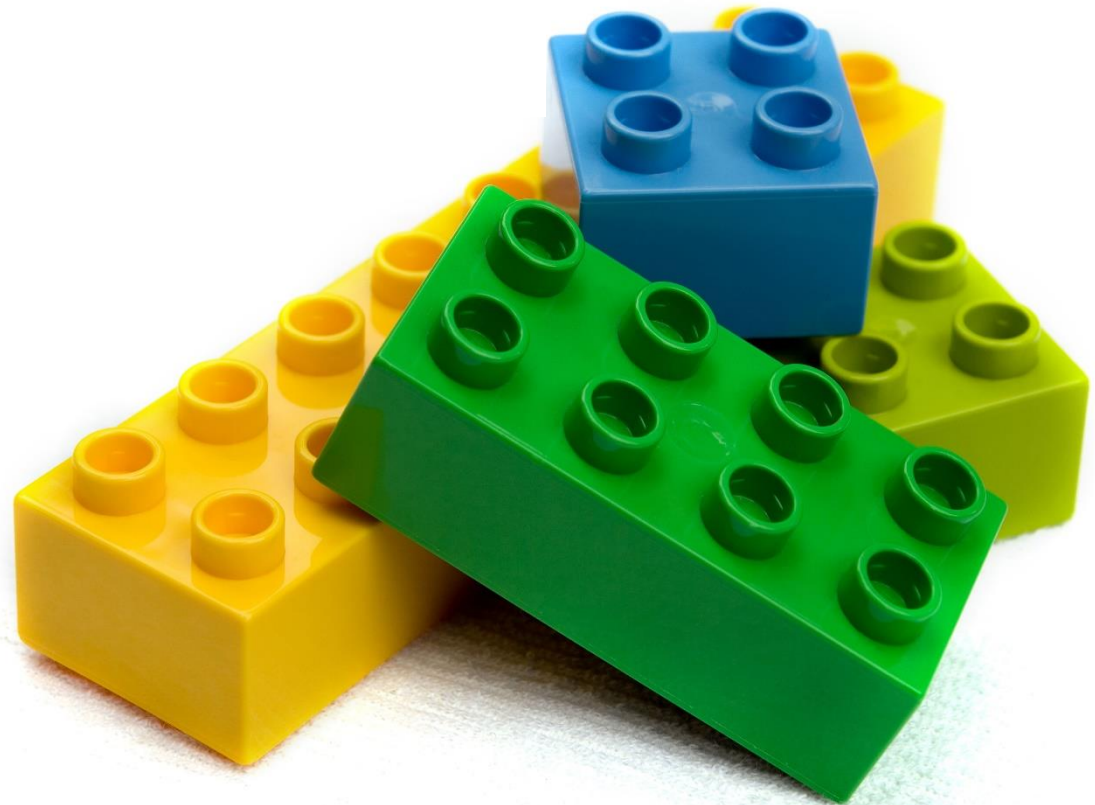


Panel Discussion

Deloitte AEC survey & business opportunities for Trade, Investments and Logistics

16th February 2016

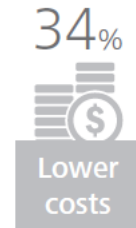


The Big Picture



96%
feel that the AEC is an **opportunity** for their business

These opportunities being:



Top 3 opportunity areas



46%
Investment



43%
Supply Chain

35%
Sales & Marketing

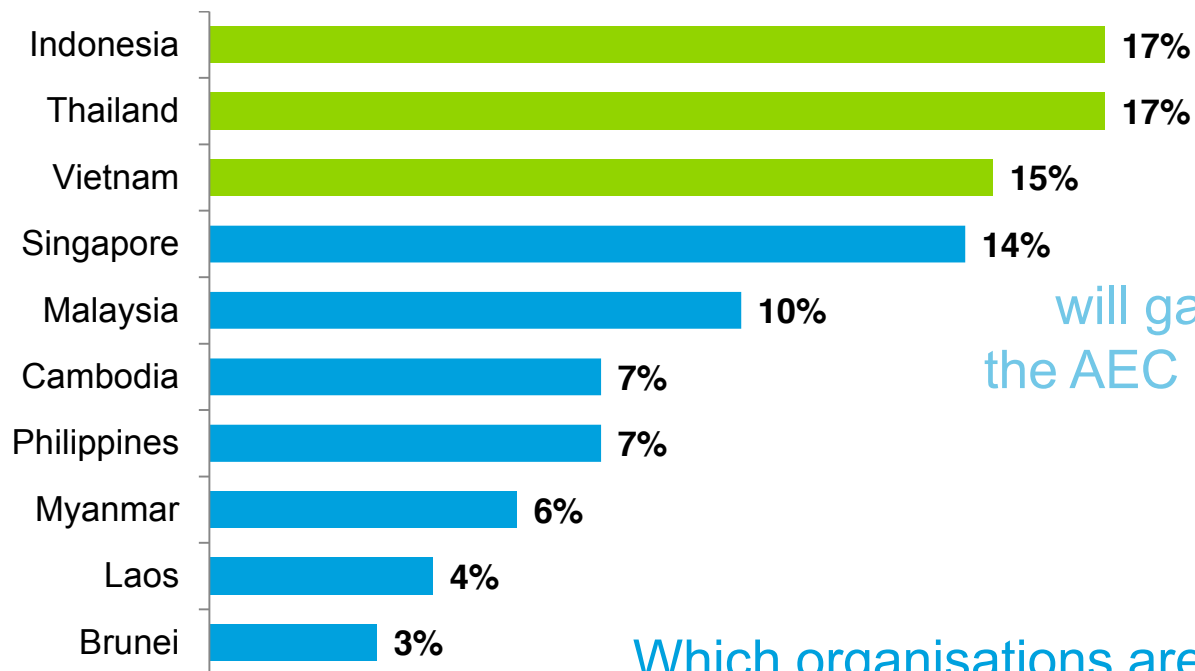


The biggest threat?

63%
say it is increased competition

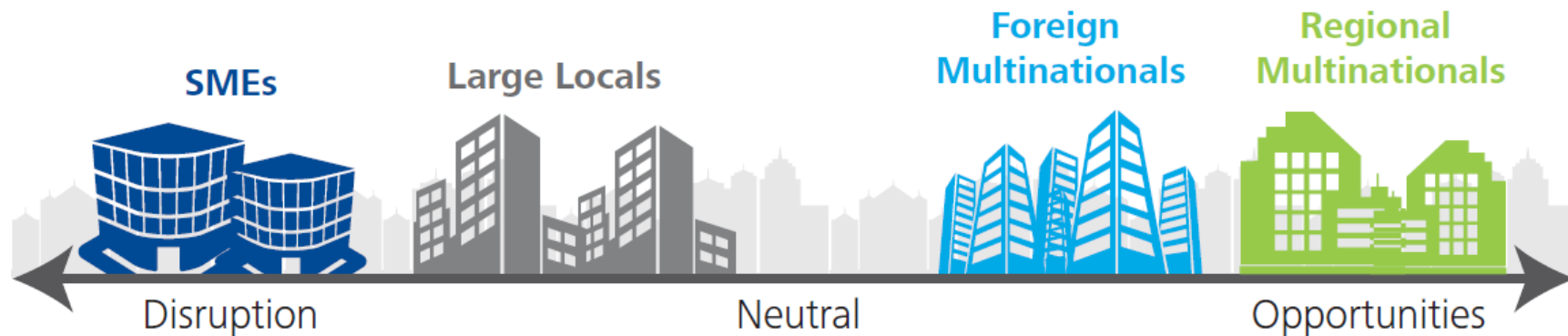


Who Gains Most?



Which countries will gain the most from the AEC in your industry?

Which organisations are expected to fare better?



The AEC

Focus on the stars

Impact =
Soon, Certain & Substantial



Stars

- Goods
- Investment liberalisation
- Competition policy
- Global integration



Steady Gains

- Capital
- Equitable development

Laggards



- Services
- Skilled Labour
- Investment facilitation
- Infrastructure

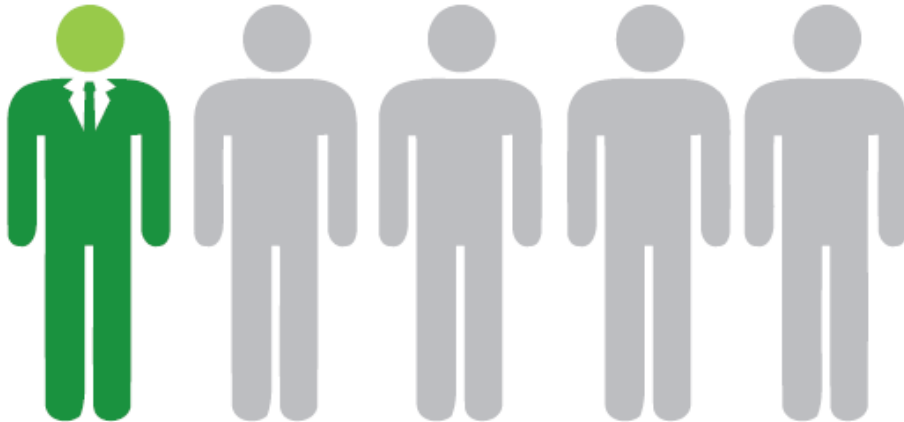
Transport, Logistics, Manufacturing
Support Industries, Consumer Business

What does business say?

Deloitte C-suite AEC survey

Only **1 in 5**

businesses have made plans and / or changes in anticipation of the AEC



- **62%** feel that the AEC measures to-date have had **limited** or **no impact**
- **51%** feel that the **potential impact** will be **significant**
- Only **3%** have analysed **potential impact** in detail
- **48%** haven't yet **engaged stakeholders** but are planning to do so
- **47%** haven't incorporated the impact in their plans as yet

Speaker Biography

Speaker Biography



Bob Fletcher

Bob Fletcher is the Leader of our Southeast Asia - Asia Pacific Customs & Global Trade team and is based in Singapore. Prior to Singapore, Bob was in China for 5 years where he led the China Customs & Global Trade team.

Before moving into customs consultancy Bob spent 13 years working for UK Customs, including 4 years specializing in Customs valuation. With over 25 years in customs and trade consultancy, Bob is one of Deloitte's foremost experts in this specialist area.

Bob has extensive experience in advising many of the world's major US, European and Asian multinational clients.

Working closely with leaders of the Corporate Tax, Transfer Pricing and Global Indirect Tax teams, Bob has assisted many MNCs structure their contractual and supply chain arrangements to be customs duty/VAT efficient., including areas on customs valuation (including transfer price adjustments), tariff planning, duty relief optimization and cash-flow planning, FTA planning and import/export controls.

Bob is a frequent speaker on customs and trade compliance and planning, and has provided valuation and tariff classification training to Customs authorities in the AP Region.

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Speaker Biography



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Mohit Mehrotra

Mohit leads the strategy practice for Deloitte SEA and has been with Deloitte Consulting for 10+ years

He has worked in North America, Western Europe and various parts of Asia across South East Asia and North Asia

Some of his recent experiences include:

- **Retail Banking and Wealth Management:** Analysed customers and their segments, and developed value propositions for a leading Asian financial institution
- **Capital and Global Markets:** Developed strategy for an US financial institution to help them gain a greater share of the market.
- **Trade Finance:** Led the development of a strategic partnership between a leading FinTech focusing on trade finance and a leading FI in the region
- **Insurance:** Helped shape the overall strategy for a multi-national insurance company with a profitable business in Singapore
- **Corporate Banking:** Led a multi-county customer satisfaction study targeting corporate clients for a leading Asian bank.

Mohit has also written numerous articles in publications such as Financial Times, Asia Insurance Review, Business Times, Asian Banking & Finance among others.

Speaker Biography



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Supply Chain Practice Leader**
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Walter Kuijpers

Walter is a Senior Manager at Deloitte Consulting South East Asia responsible for Supply Chain Management within the Strategy & Operations service line.

He earned his BSc. Engineering Degree in Analytical Chemistry from the Dutch Hanzehogeschool in Groningen (Netherlands) followed by a Post-Academic Degree in Distribution Logistics. Before moving to Asia Pacific, Walter spent 6 years working in the Netherlands in the Integrated Supply Chain for one of the largest global technology company.

He has over 16 years' of experience with a balanced mix of consulting and industry experience in Supply Chain Management covering Inventory Management, Collaborative Planning & Forecasting, Logistics Operations, and Sales & Distribution. Walter has worked across Consumer Business, Hi-Tech, Telecommunications and Energy & Resources industries in supply chain project delivery, sales and P&L roles in Europe, Australia, Japan, India, China and South East Asia.

Walter is involved in various client interactions on the tax aligned supply chain and it's implications on the supply chain network including master data and working capital implications in the context of AEC.

Contacts

To find out more information on the AEC, please visit www.deloitte.com/sg/aec or contact out AEC Agenda team below.



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