

MARITIME CONTAINER TRADE IN LATIN AMERICA AND THE CARIBBEAN, 2007

The authors of this issue are Ricardo J. Sánchez and Maricel Ulloa S., Natural Resources and Infrastructure Division of ECLAC. For further information, please contact Ricardo.SANCHEZ@cepal.org.

1. ECONOMIC GROWTH IN LATIN AMERICA AND THE CARIBBEAN

Ports, maritime transport and logistics play a major role in the economic development of countries. Over the last few years, the nature of economic development in our region has only served to underscore their importance. In effect, the most robust aggregates in the region's economy have been closely linked to these areas.

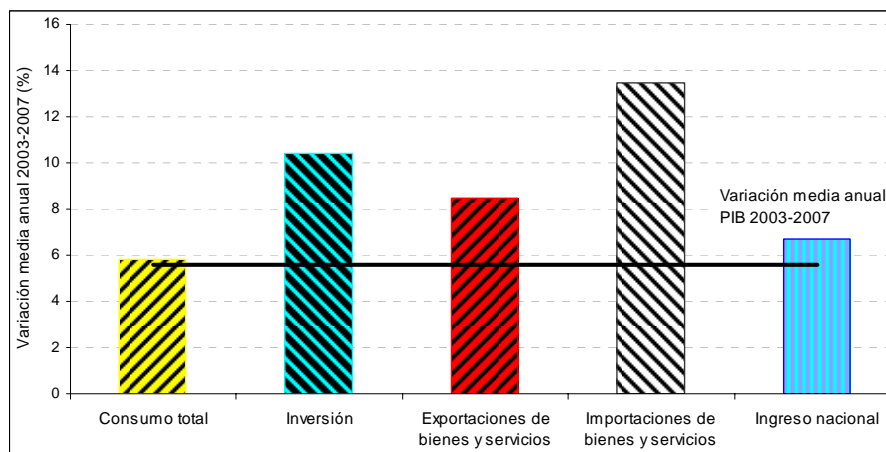
According to the *Preliminary Overview of the Economies of Latin America and the Caribbean*, published by ECLAC,¹ the region's gross domestic product (GDP) grew approximately 5.7% in 2007, while per capita GDP climbed 4.4%. Therefore, 2007 was the fifth consecutive year in which the economy grew, with average annual growth of 5.6% between 2003 and 2007.

The growth of the region's economies has benefitted from highly favorable external conditions, characterized by the prolonged expansion of the global economy² and the growing contribution by China, India, and other Asian economies to global demand; in line with demand for our products and the entry of inputs and intermediate and final products, ports, maritime transport and internal logistics are linked with the most dynamic aspects of regional growth.

¹ See: <http://www.eclac.org/publicaciones>

² At the time of writing, there was not yet any discussion of a crisis, although some signs of a crisis were emerging.

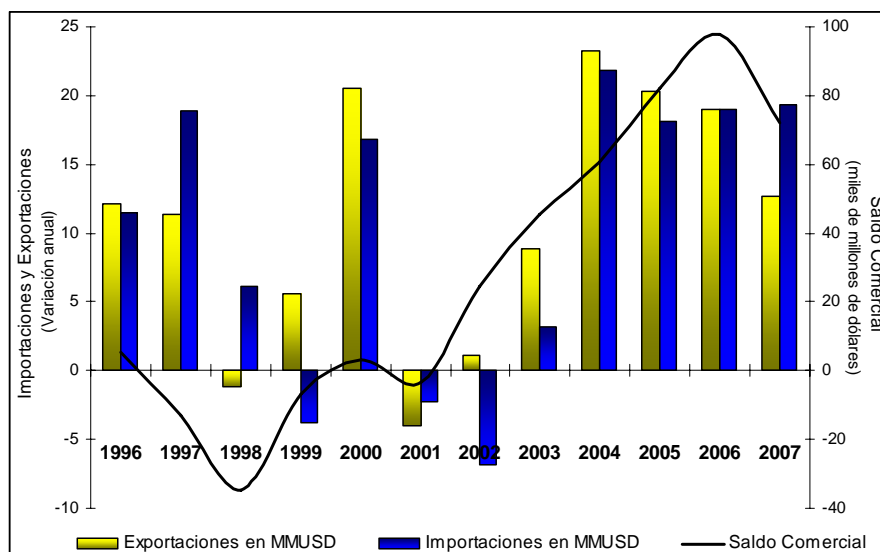
**Figure 1: PRINCIPAL MACROECONOMIC AGGREGATES
BETWEEN 2003 AND 2007**



Source: The authors, based on the ECLAC/EDD database.

Total exports grew 8.5% on average between 2003 and 2007, and gross capital formation climbed at an average rate of 10.4%. Imports easily outpaced GDP, growing at an annual average rate of more than 13.5%.

**Figure 2: LATIN AMERICA AND THE CARIBBEAN: FOREIGN TRADE,
1996-2007**



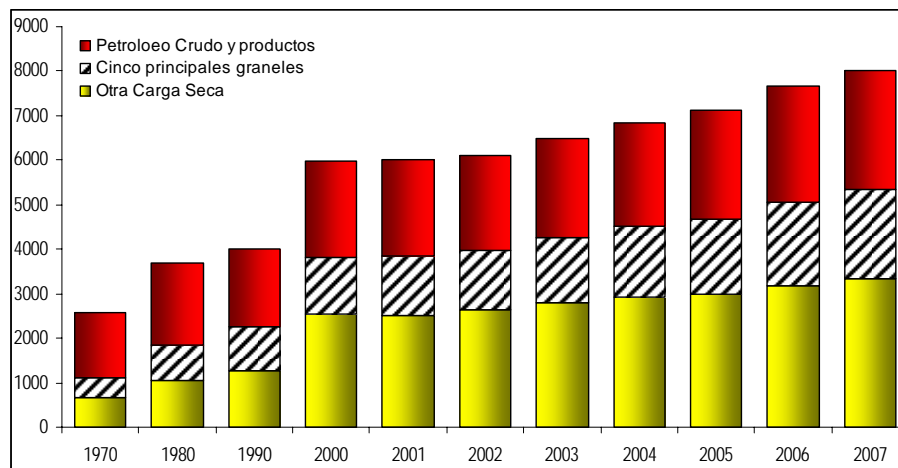
Source: The authors, based on the ECLAC/EDD database.

In Latin America and the Caribbean, foreign trade in goods totaled US\$ 1.4 trillion³ in 2007, with exports accounting for US\$ 751 billion and imports accounting for US\$ 677 billion, generating a positive trade balance in goods of US\$ 74 billion. Imports outperformed exports, with growth rates at 18% and 12.3%, respectively.

2. AN OVERVIEW OF MARITIME CONTAINER TRADE

The maritime container industry is the largest growth sector in the global economy, as well as in Latin America and the Caribbean.

Figure 3: **INTERNATIONAL MARITIME TRADE, 1970-2007**



Source: Review of Maritime Transport, UNCTAD.

According to the *Review of Maritime Transport 2008*, published by the United Nations Conference on Trade and Development (UNCTAD), global maritime trade experienced robust growth in 2007, with 8.022 billion tons of goods transported. The annual growth rate for 2007 was 4.8%.

Asia leads the world in goods loaded per continent with 40%. Next is the Americas with 23%, closely followed by Europe with 18%. Africa and Oceania are far behind the rest of the continents, accounting for 10% and 9% of the total share, respectively. The only continent that has seen its share decline is Europe.

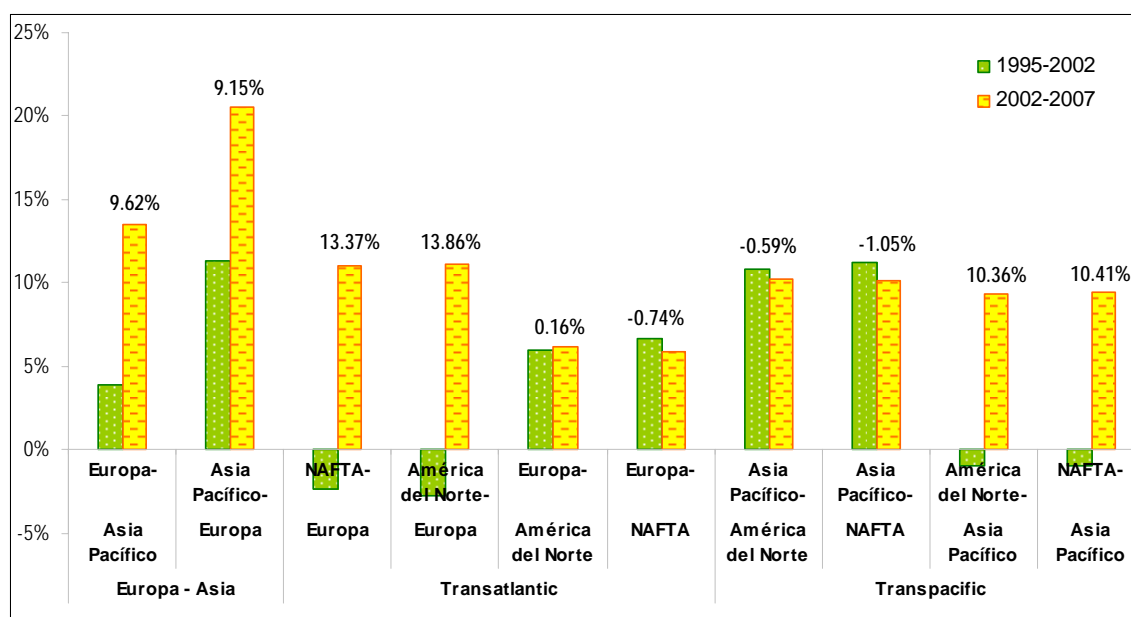
³ One million millions (1×10^{12})

Table 1: CONTAINER MOVEMENT VIA THE WORLD'S MAJOR SHIPPING ROUTES 1995-2007

Año	Europe - Asia		Transatlantic				Transpacific			
	Europa-Asia Pacífico	Asia Pacífico-Europa	NAFTA-Europa	América del Norte-Europa	América del Norte-Europa	Europa-NAFTA	América del Norte-Asia Pacífico	Asia Pacífico-NAFTA	Norte-Asia Pacífico	NAFTA-Asia Pacífico
1995	2,184,992	2,606,968	1,588,941	1,525,693	1,561,130	1,628,192	4,003,707	4,091,839	4,075,577	4,118,361
1996	2,384,952	2,830,791	1,506,006	1,432,557	1,571,335	1,653,999	3,991,038	4,107,755	4,055,376	4,180,073
1997	2,510,889	3,213,299	1,615,138	1,541,608	1,875,900	1,993,344	4,550,096	4,699,543	3,874,020	3,956,434
1998	2,266,585	3,884,409	1,562,073	1,489,727	2,081,814	2,277,915	5,385,788	5,545,926	3,231,725	3,272,529
1999	2,530,890	4,232,447	1,411,858	1,336,212	2,161,378	2,350,475	6,074,632	6,289,077	3,302,449	3,347,313
2000	2,660,665	5,049,869	1,603,539	1,510,192	2,410,132	2,614,031	7,168,309	7,524,830	3,983,385	4,037,920
2001	2,664,546	5,111,613	1,459,354	1,361,984	2,306,867	2,500,061	7,288,450	7,648,356	3,840,874	3,889,861
2002	2,851,963	5,542,878	1,344,836	1,255,912	2,350,085	2,554,798	8,218,943	8,600,582	3,805,565	3,859,142
2003	4,067,167	7,458,715	1,536,518	1,444,435	2,747,608	2,937,797	8,981,056	9,263,693	4,076,593	4,132,099
2004	4,649,317	8,867,338	1,769,197	1,644,703	3,230,618	3,419,615	10,548,619	10,892,114	4,615,996	4,679,727
2005	4,774,106	10,126,268	1,865,852	1,766,259	3,412,640	3,607,892	11,859,066	12,245,247	5,050,139	5,129,780
2006	4,817,158	12,176,775	1,929,178	1,800,885	3,408,877	3,623,044	13,072,595	13,552,951	5,296,709	5,392,281
2007	5,370,779	14,096,877	2,267,891	2,127,875	3,171,415	3,404,781	13,378,358	13,940,179	5,958,330	6,070,162

Source: Global Insight

Figure 4: ANNUAL AVERAGE CHANGE IN CONTAINER MOVEMENT VIA THE WORLD'S MAJOR ROUTES, 1995-2007



Note: The percentages indicated in the figure correspond to the spread between the annual average changes for both periods of analysis.

Source: The authors, based on the Global Insight database.

Based on the Global Insight Inc. database (see the Maritime Profile)⁴, with respect to the world's major shipping routes, an average annual rate of change (%) was obtained for container movement for the periods 1995-2002 and 2002-2007. Comparisons of the rates from both periods reveal the prevailing

⁴ Maritime Profile: <http://www.cepal.org/perfil>

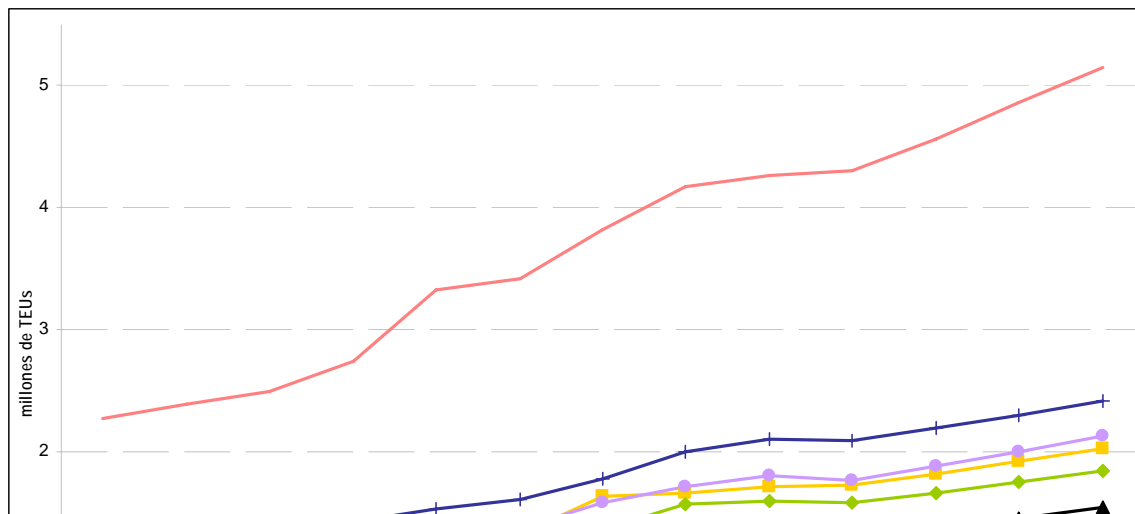
patterns for the routes studied. For the vast majority of these routes, the rates of change increased in the second period of study. However, most of the routes terminating in North America experienced a contraction in the second period of study.

3. MARITIME CONTAINER TRADE IN LATIN AMERICA AND THE CARIBBEAN

In order to compare routes originating or terminating in countries of Latin America and the Caribbean with the world's major shipping routes, an average annual rate of increase of 10.10% was calculated for the period 2002-2007 using Global Insight data. This rate is similar to the figure obtained for the rest of the routes studied. Therefore, it can be concluded that maritime container trade in the region has expanded at a rate similar to that for the rest of the world.

The average annual rate of increase was influenced by exports and imports in a group of countries (see Figure 5). This data provides average annual rate of increase of 8.35% for exports and 12.25% for imports between 2000 and 2007.

Figure 5: **MARITIME TRADE IN LATIN AMERICA AND THE CARIBBEAN, 2000-2012**



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