

Cátedra Ciudad

Las infraestructuras y la logística como oportunidad de desarrollo

Valencia, 24 febrero de 2010

“Las consecuencias de la globalización. La competitividad logística como factor de crecimiento”



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1. La globalización

1. ¿Qué es?
2. ¿Cuáles son sus causas?
3. ¿Cuáles son sus efectos?

2. Comercio, transporte, logística y competitividad



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¿Qué es la globalización?



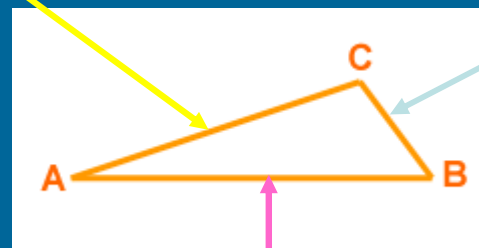
Globalización

Interdependencia entre los países

Reducción barreras a los intercambios y los flujos entre países

Globalización social

Globalización política



Globalización económica



Globalización

Dimensión poliédrica

Comercio
(Bienes y servicios)

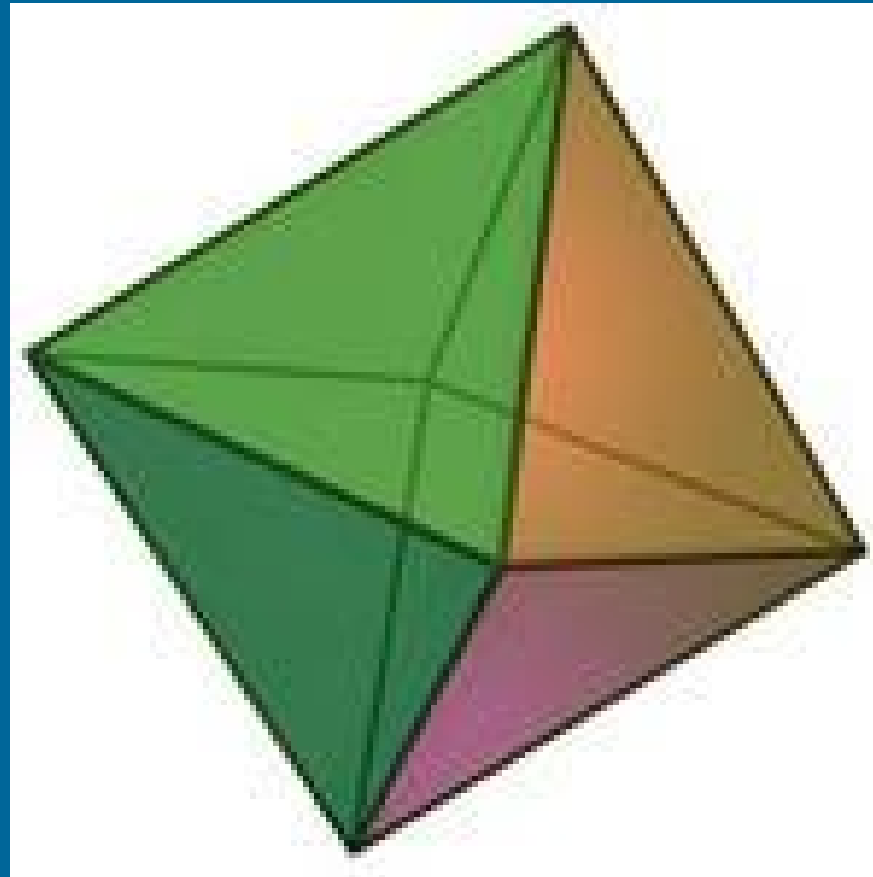
**Inversiones (IED;
EM)**

Multilateralismo

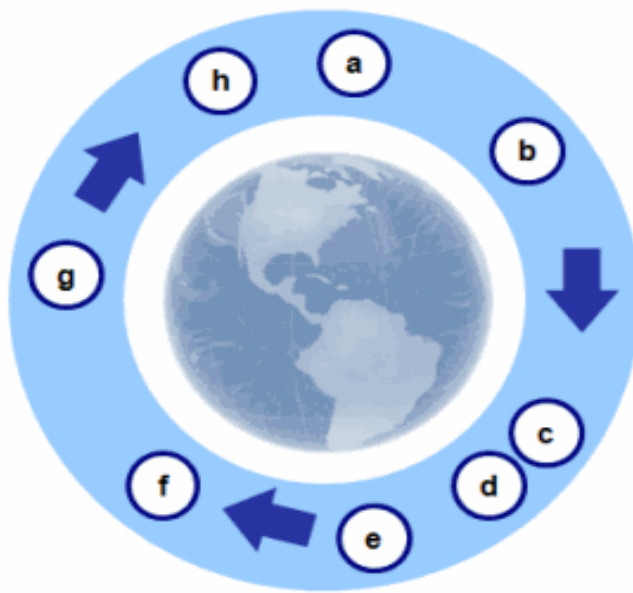
Cultura...

Finanzas

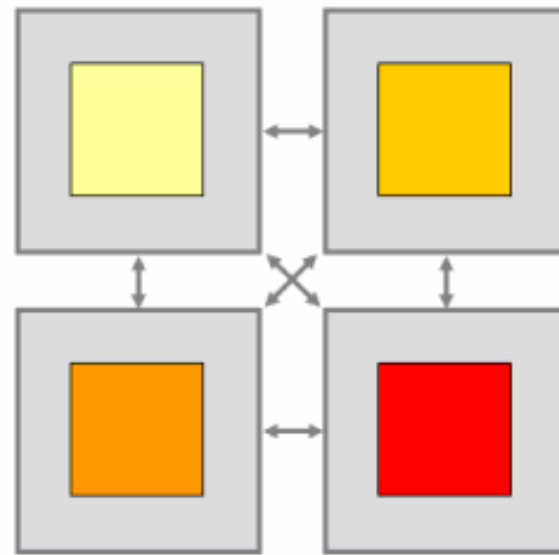
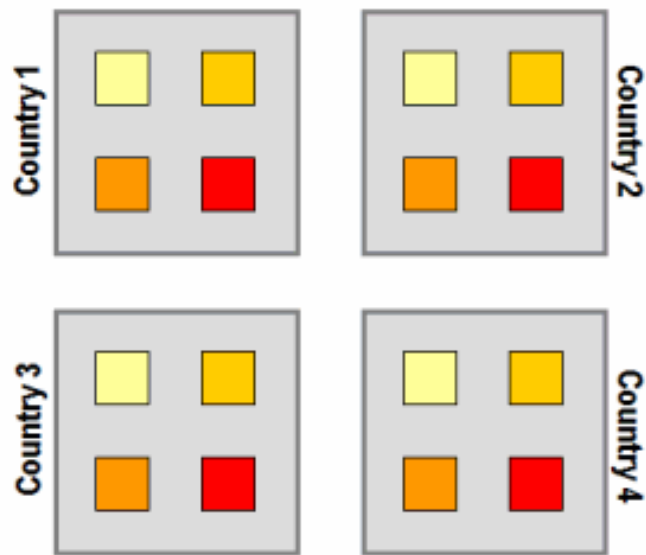
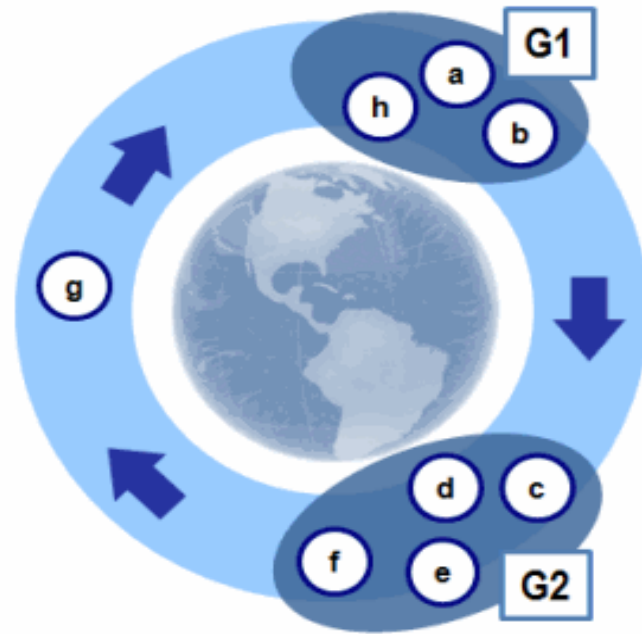
Migraciones



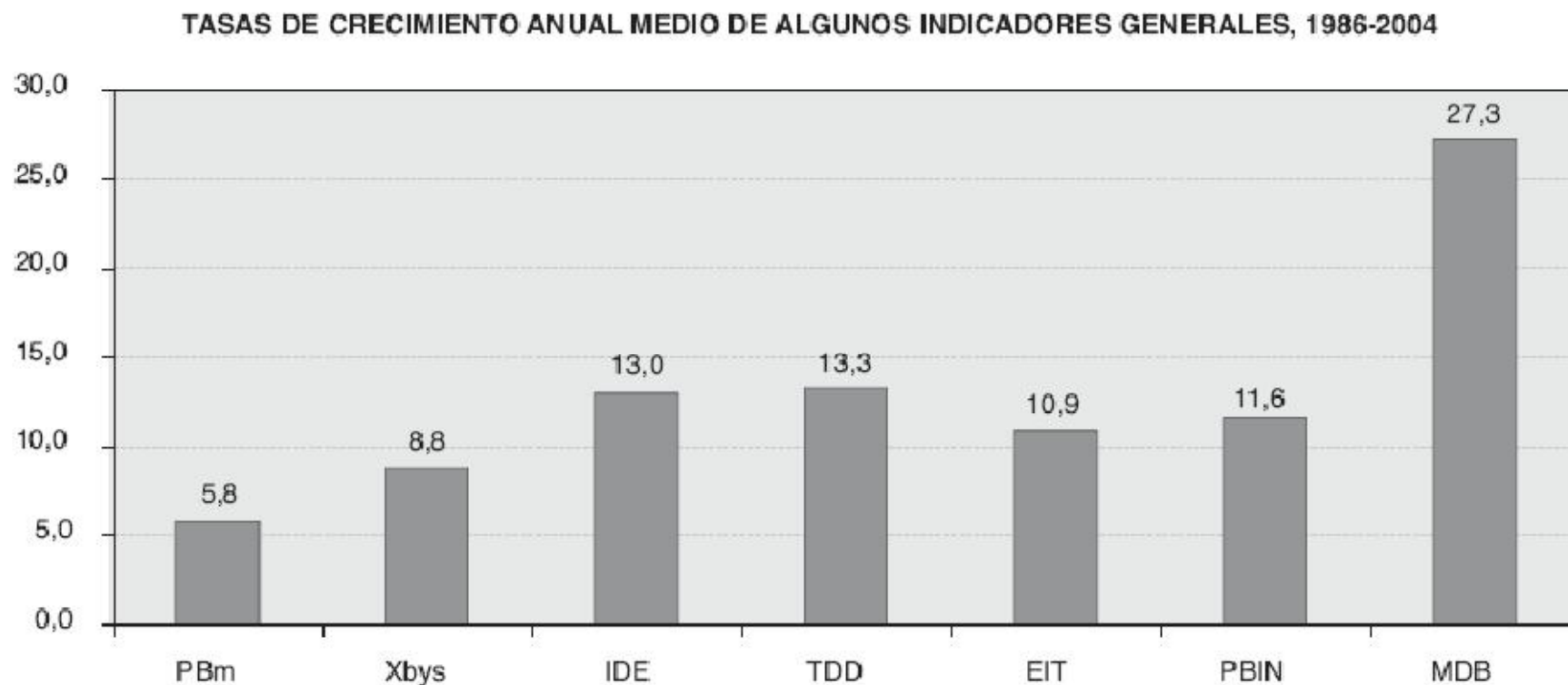
Independent Nations



Interdependent Groups of Nations



Globalización económica: el PIB crece menos que otras variables económicas internacionales



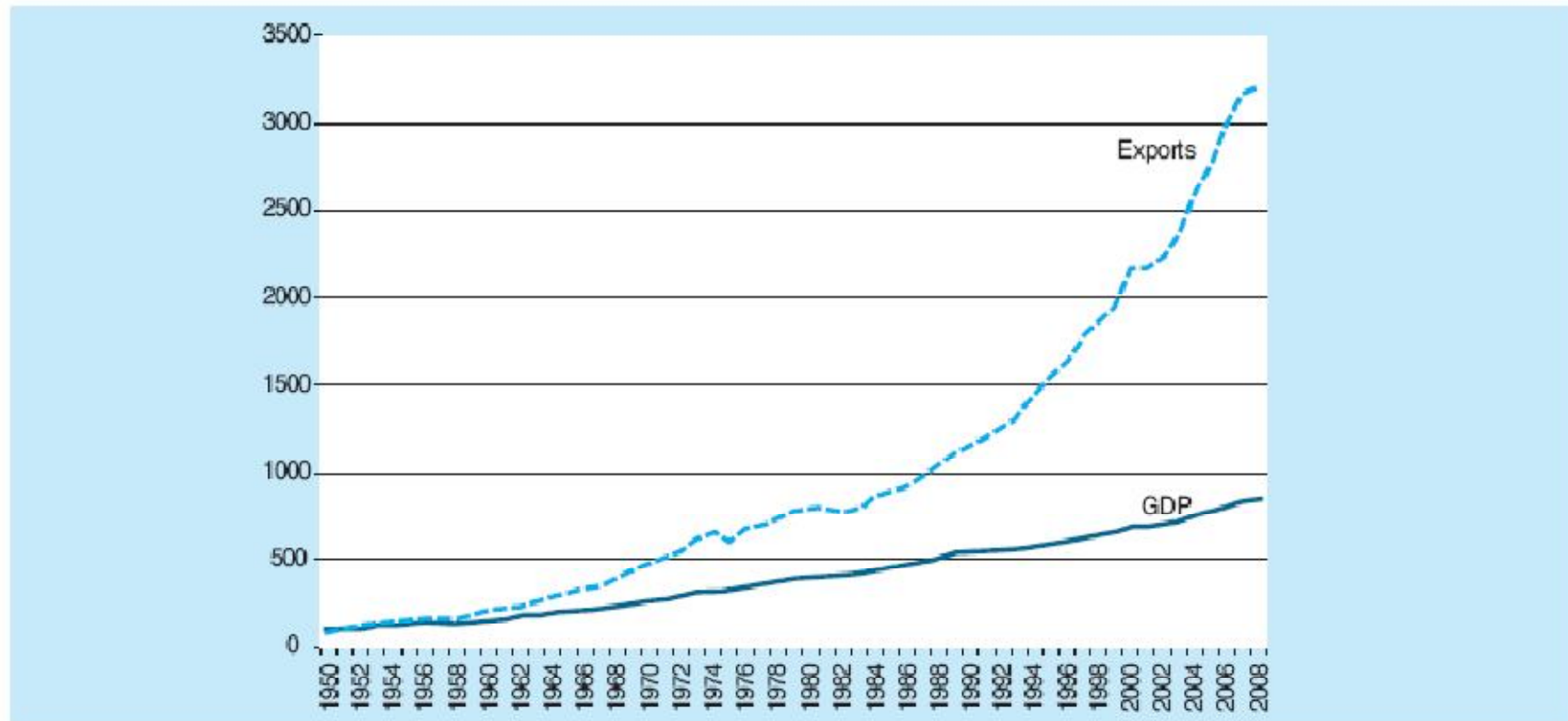
Notas: PBm: producto bruto mundial; Xbys: exportaciones de bienes y servicios; IDE: *stock* de inversión directa en el extranjero; TDD: transacciones diarias de divisas; EIT: emisión internacional de títulos; PBIN: préstamos bancarios internacionales netos; MDB: mercado de derivados bursátiles.

Fuentes: BPI, FMI, OMC, UNCTAD y elaboración propia.



Globalización comercial

Indices for world economic growth (GDP) and world merchandise exports (volume), selected years
(1950 = 100)

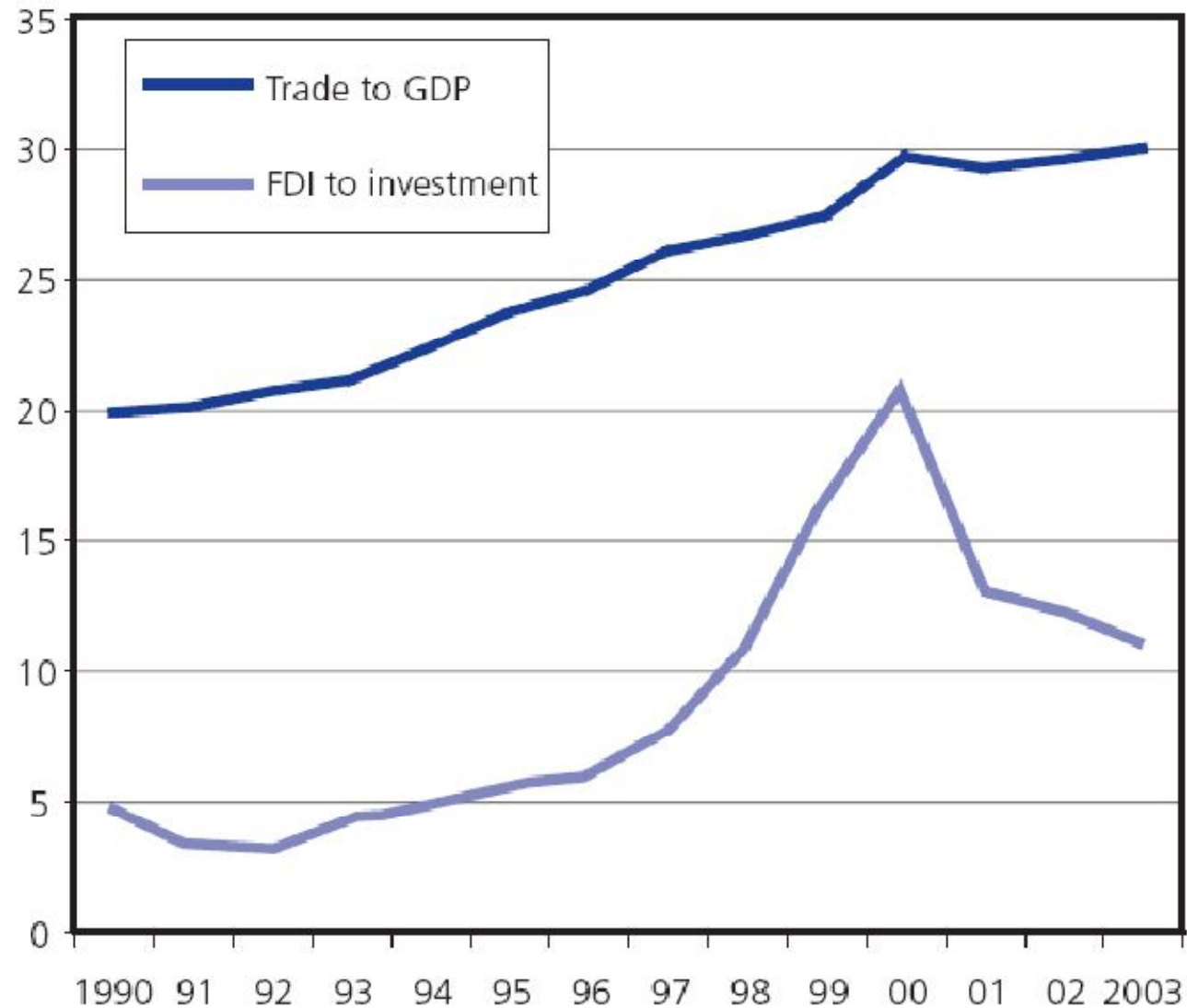


Source: UNCTAD, based on World Trade Organization, Table A1, Trade Statistics, 2008. Trade volumes data are derived from customs values deflated by standard unit values and adjusted price index for electronic goods.



Ratio of world trade to GDP and ratio of global FDI flows to world fixed investment, 1990-2003

(Percentage)





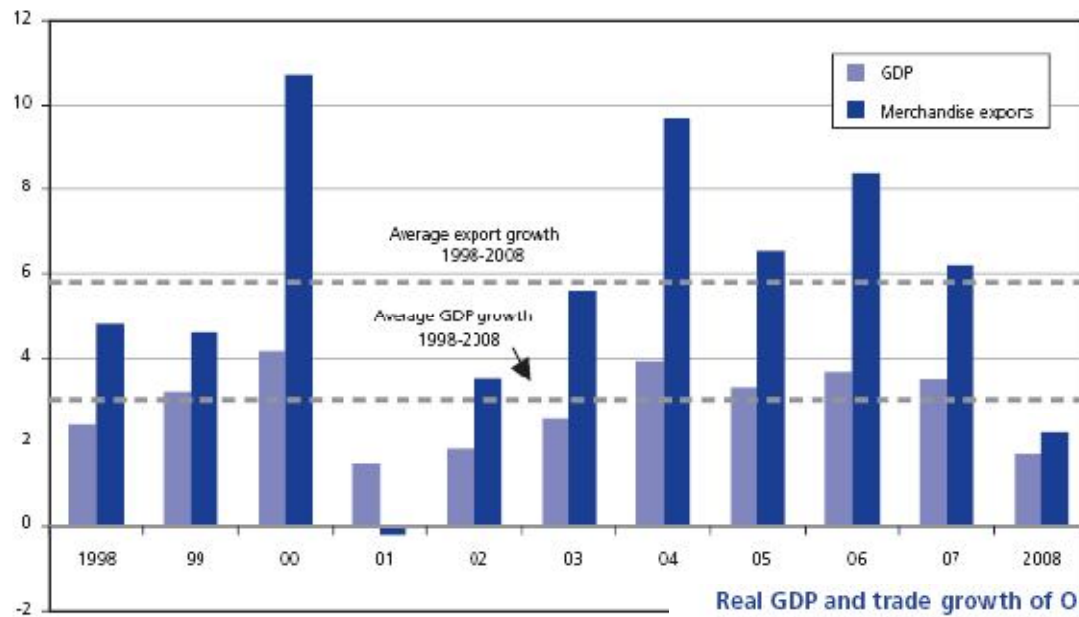
The Growth of World Trade and GDP: 1951-2005 (Annual percent change)



Source: WTO (World Merchandise Export Growth 1951-2005),
Maddison (GDP growth 1951-1970), IMF WEO (GDP growth 1971-2005)

Growth in the volume of world merchandise trade and GDP, 1998-2008

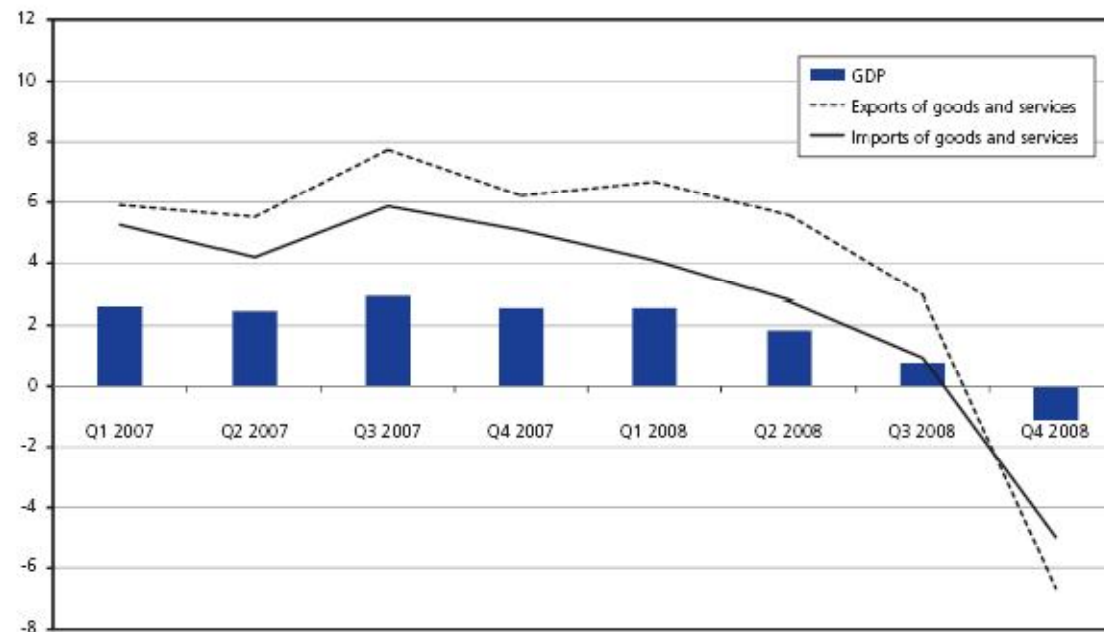
(Annual percentage change)



Source: WTO Secretariat.

Real GDP and trade growth of OECD countries, 2007-08

(Percentage change on a year to year basis)



Source: OECD National Accounts.



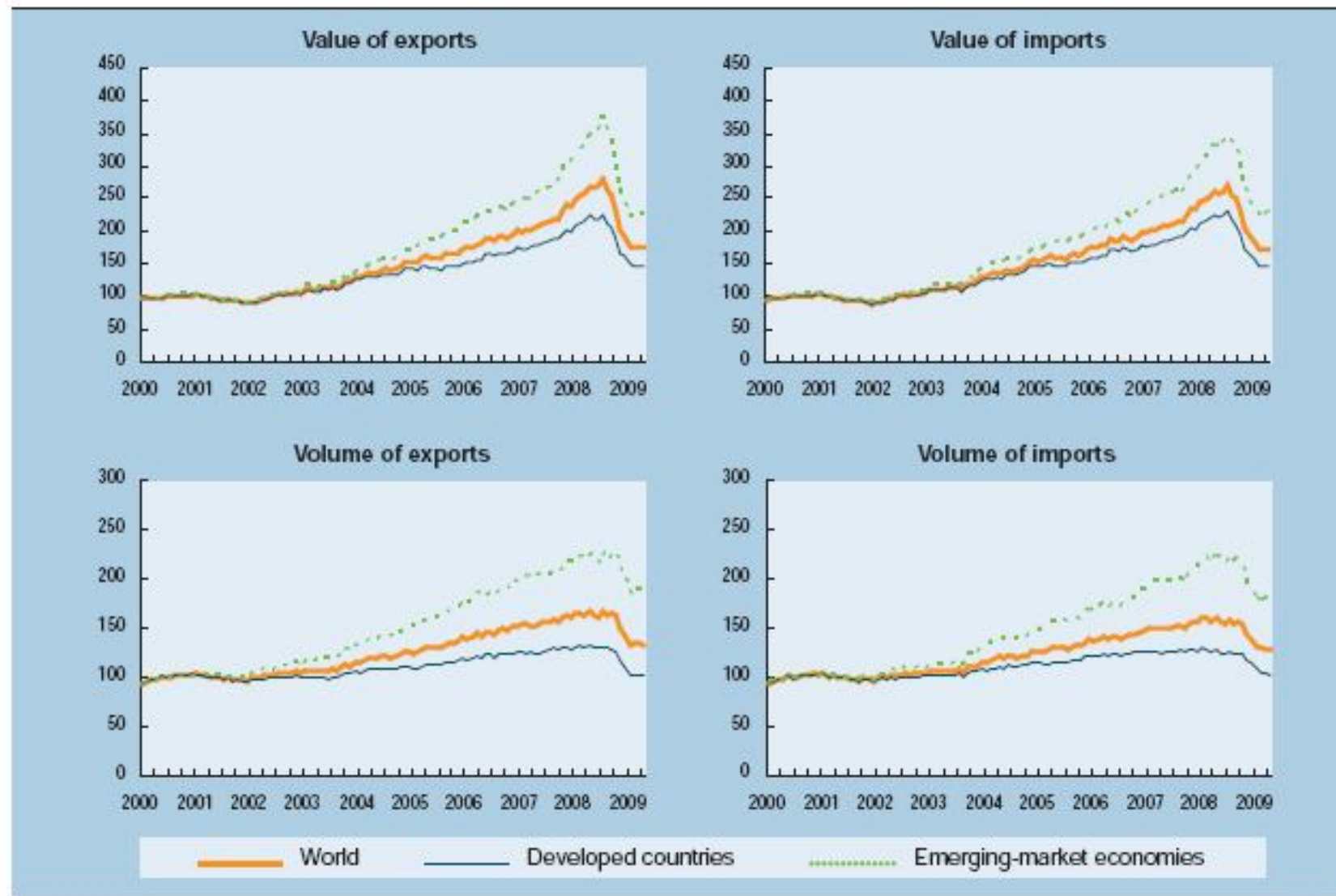
World GDP growth, 2003–2009, selected countries (annual percentage change)



Source: UNCTAD secretariat calculations, based on the United Nations Department of Economic and Social Affairs (UN-DESA), National Accounts Main Aggregates Database, and the World Economic Situation and Prospects (WESP) 2009: Update as of mid-2009; Organization for Economic Cooperation and Development (OECD), Economic Outlook No 85, Preliminary Edition, June, 2009, Economic Commission for Latin America and the Caribbean, Economic Survey of Latin America and the Caribbean 2008-2009, July, 2009; and national sources.

WORLD TRADE BY VALUE AND VOLUME, JANUARY 2000–APRIL 2009

(Index numbers, 2000 = 100)



Source: UNCTAD secretariat calculations, based on the CPB Netherlands Bureau of Economic Policy Analysis, *World Trade* database.

2003-2005 Trade to GDP Ratio

Country	Representative Proxy Fund(s) *	2005 Trade to GDP Ratio
USA	SPY, IVV	24.37
Japan	EWJ, ITF	25.59
Brazil	EWZ	29.49
India	INP, IFN	36.56
Australia	EWA, IAF	39.47
Italy	EWI	51.55
France	EWQ	51.93
South Africa	EZA	54.87
UK	EWU	55.28
Spain	EWP, SNF	55.71
Russia	RSX, TRF	57.11
Indonesia	IF	59.35
Mexico	EWW, MXF	60.09
Turkey	TKF	61.11
China	FXI, CHN	64.51
Germany	EWG	71.29
Chile	CH	71.67
Canada	EWC	72.94
Korea	EWK, KF	79.90
Sweden	EWD	86.85
Israel	ISL	87.72
Switzerland	EWL	94.30
Austria	EWO	106.89
Taiwan	EWT, TWN	120.22
Netherlands	EWN	127.65
Thailand	TF, TTF	137.75
Belgium	EWK	165.35
Malaysia	EWM, MAY	217.92
Hong Kong	EWH	363.49
Singapore	EWS, SGF	431.80

* two traded funds with largest asset base -
mutual funds not included

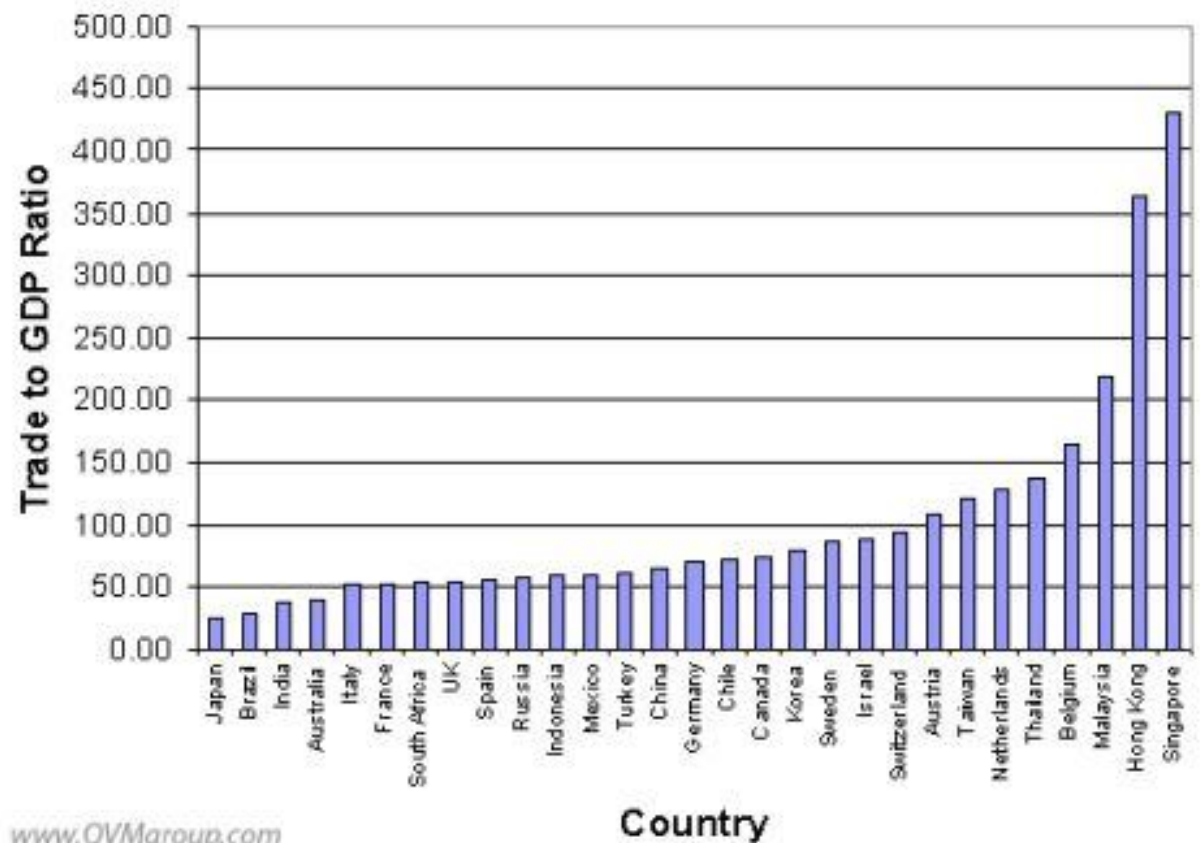
Source: WTO

www.QVMgroup.com

Aunque existen importantes diferencias entre el grado de internacionalización comercial de unos países y otros

2003-2005 Trade to GDP Ratio

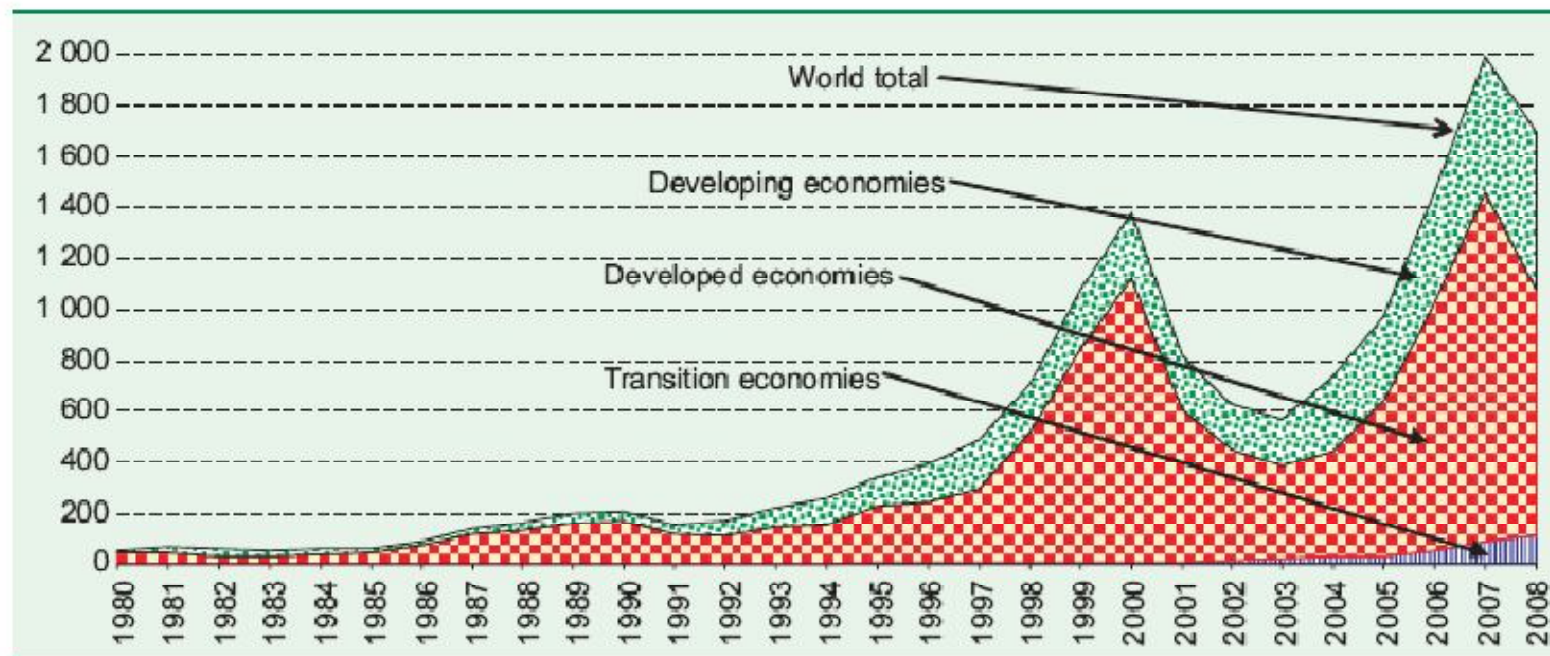
(source WTO)





Globalización empresarial (IED, multinacionales)

Figure I.1. FDI inflows, global and by groups of economies, 1980–2008
(Billions of dollars)



Source: UNCTAD FDI/TNC database (www.unctad.org/fdistatistics) and UNCTAD Secretariat estimates.

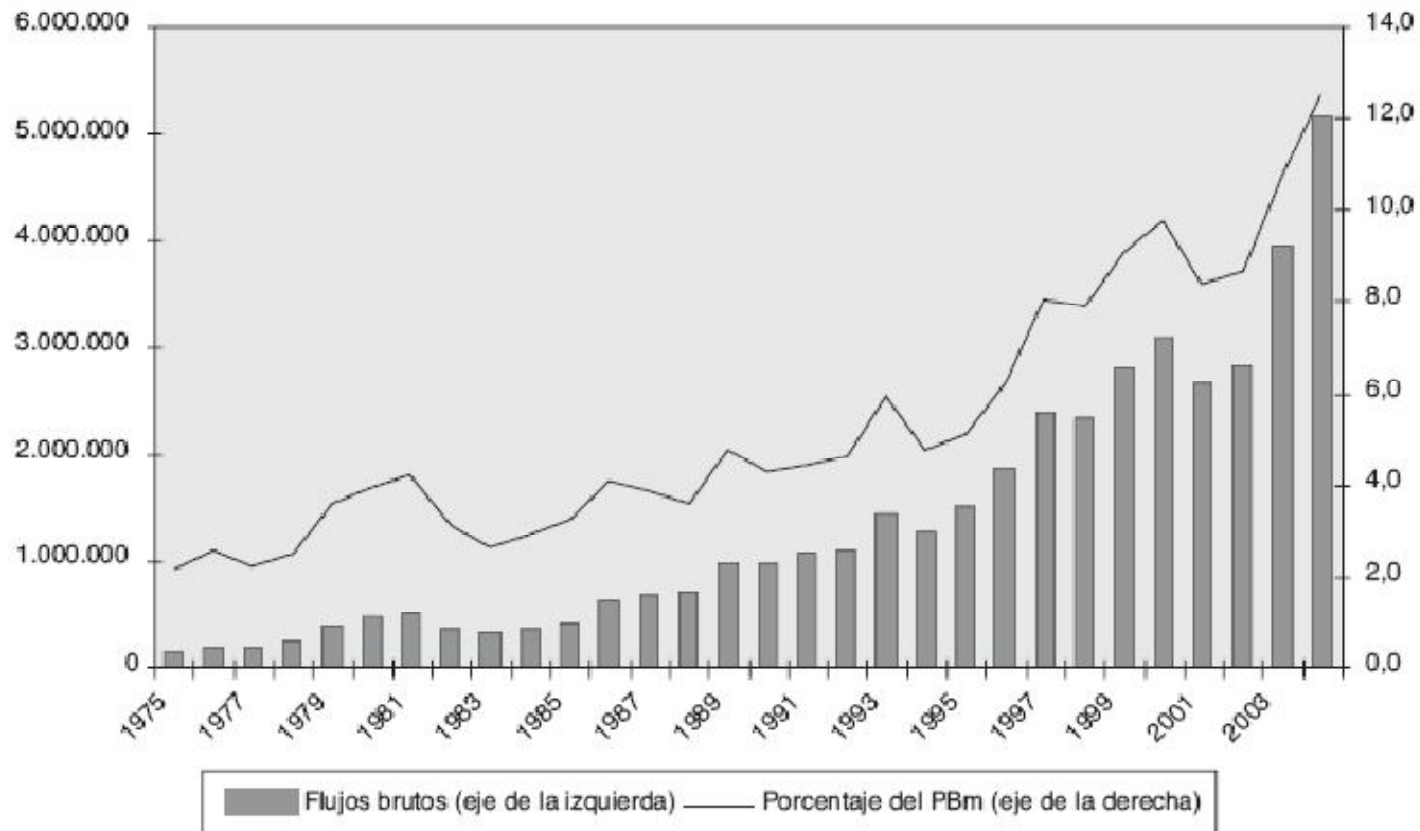


- Una tercera parte del comercio mundial está constituido por transacciones intraempresariales, la mayor parte de empresas transnacionales (ETN)
- Las filiales extranjeras de unas 64.000 ETN generan 53 millones de empleos.
- La IED es la fuente más importante de financiación externa para los países en desarrollo.
- El monto acumulado interno de IED de los países en desarrollo asciende a aproximadamente una tercera parte de su PIB, en comparación con sólo el 10% registrado en 1980.



Globalización financiera

FLUJOS INTERNACIONALES DE CAPITAL (SIN CONTAR LA INVERSIÓN DIRECTA EN EL EXTRANJERO), 1975-2004
(Millones de dólares y porcentajes del producto bruto mundial)



Fuentes: FMI, UNCTAD y elaboración propia.



Índice

2. ¿Cuáles son las causas de la globalización?

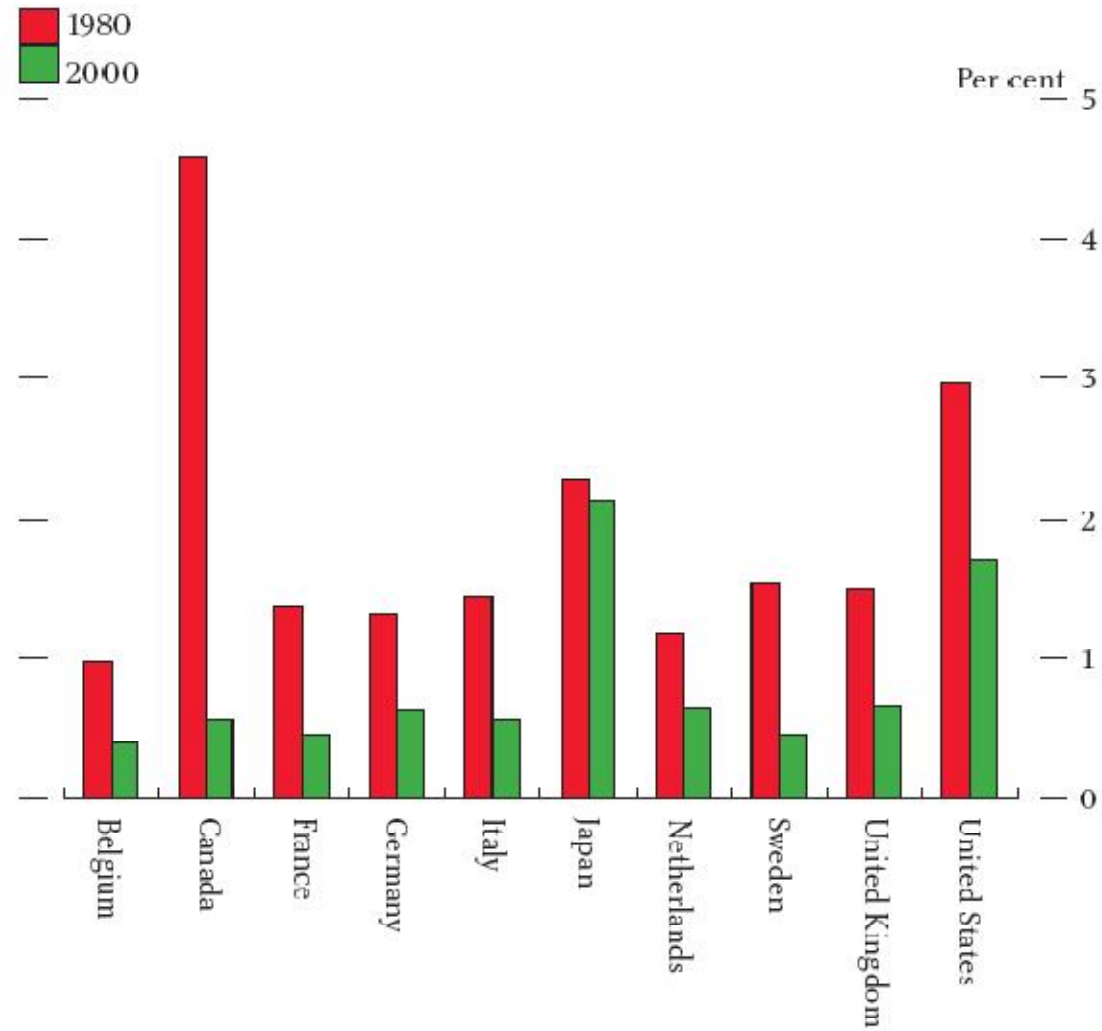


- **Causas políticas:**
 - 1989: "Fin de la historia". Triunfo de la democracia y la economía de mercado
 - Liberalización, privatización, desregulación (Consenso de Washington)
- **Causas tecnológicas y económicas:**
 - Revolución tecnológica comunicaciones y transporte
 - Reducción costes intercambios
 - Internacionalización de las empresas



Liberalización, caída de los aranceles y otras barreras

Tariff rates as a percentage of total import costs



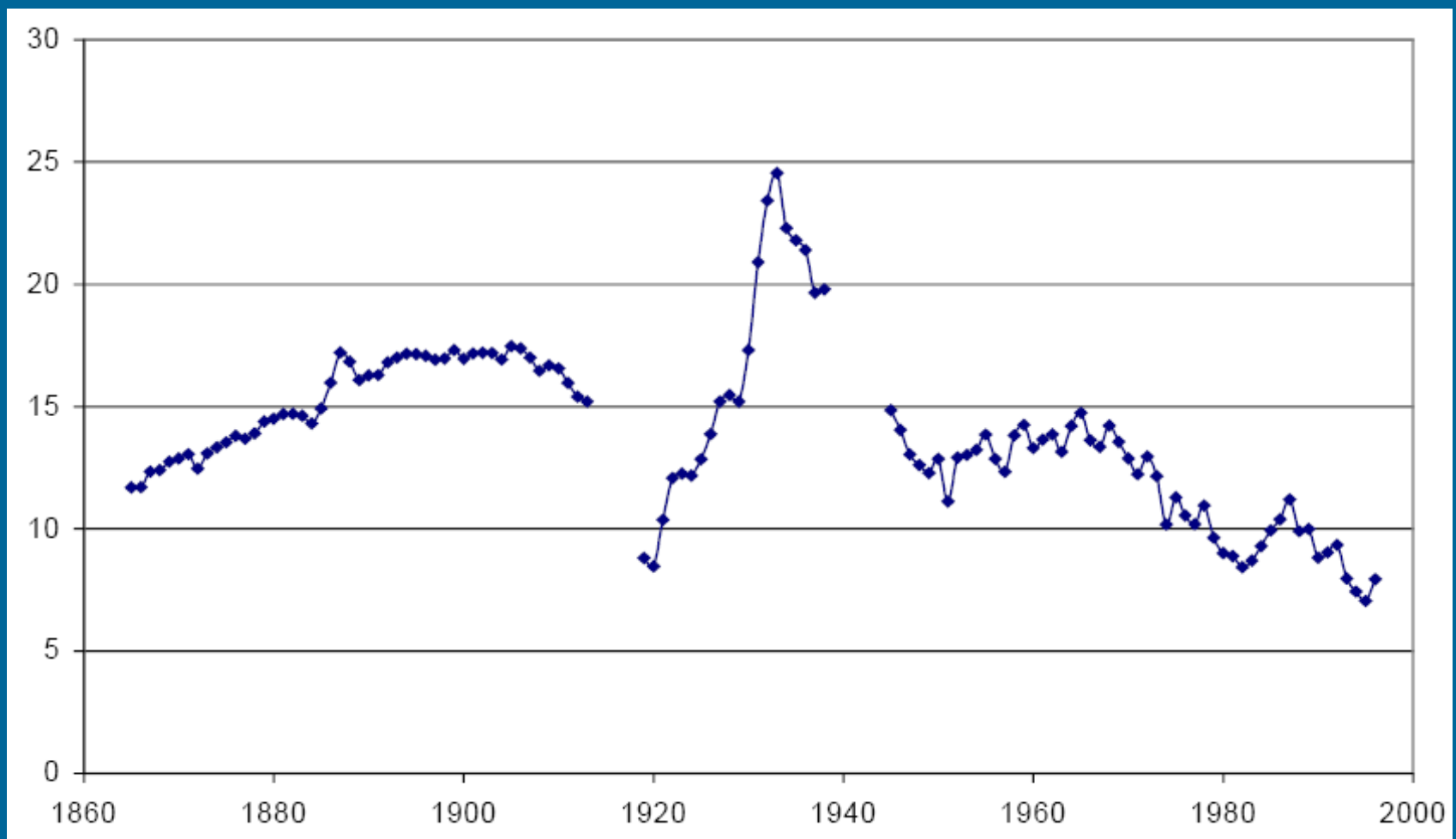
Sources: Bank of England estimates, EU Commission, United Nations, and World Bank.

Average tariff reductions during individual GATT Rounds 1947-1994

GATT Round	Avg. Tariff reduction (%)	Remaining tariffs as % of 1930 level
Before GATT (1934-47)	32.2	67.8
First Round (1947)	21.1	53.5
Second Round (1949)	1.9	52.5
Third Round (1950-51)	3.0	50.9
Fourth Round (1955-56)	3.5	49.1
Dillon Round (1961-62)	2.4	47.9
Kennedy Round (1964-67)	36.0	30.7
Tokyo Round (1974-79)	29.6	21.6
Uruguay Round (1986-1994)	30.0	15.1

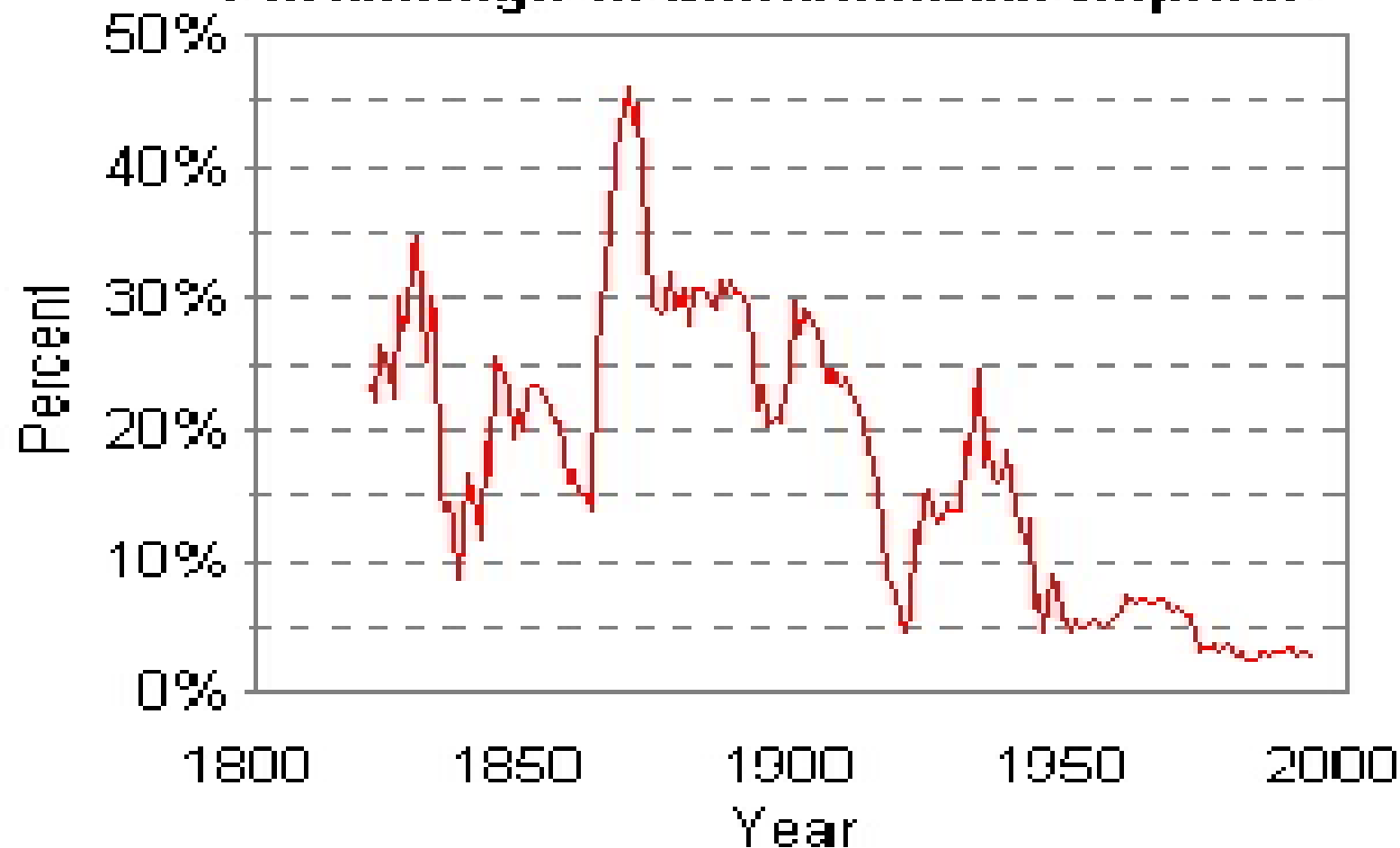
Fuente: Development of world trade and trade policy Jože P. Damijan

Unweighted World Average Own Tariff, 35 Countries, %



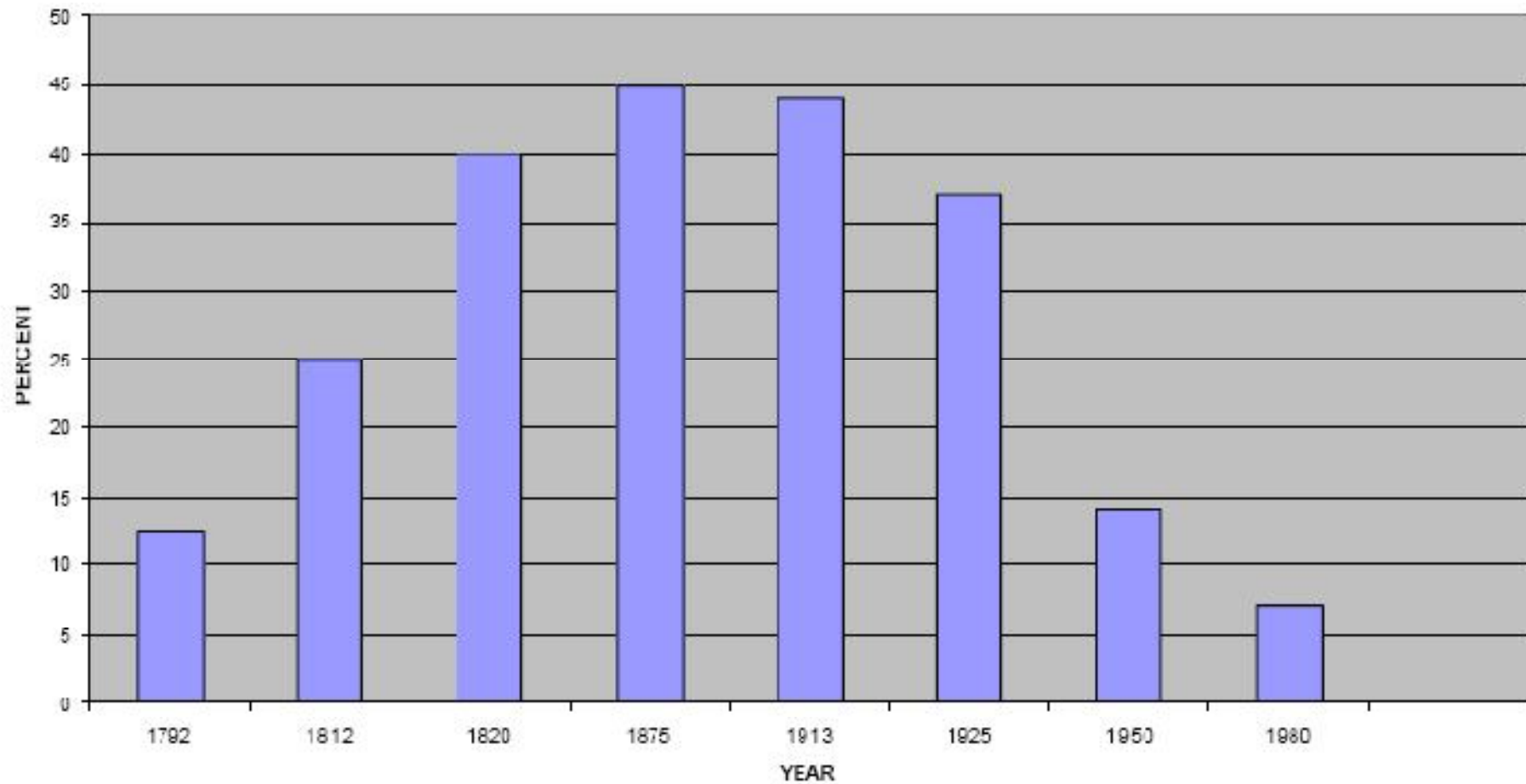
Fuente: Development of world trade and trade policy Jože P. Damijan

US Customs Tax Revenue as a Percentage of Merchandise Imports



Source: 1821-1970: U.S. Dept. of Commerce: Bureau of Census,
Historical Statistics of the United States, Part 2, 1976.

**FIGURE 1: UNITED STATES INDUSTRIAL TARIFFS
(Average Applied Tariffs)**



**THE WTO NEGOTIATIONS ON INDUSTRIAL TARIFFS: WHAT IS
AT STAKE FOR DEVELOPING COUNTRIES?**

Yilmaz Akyüz²
May 2005, Geneva



Liberalización, caída de los aranceles y otras barreras

Table 2. Bound tariffs on industrial products.^a Scope of bindings, simple averages, standard deviations and tariff peaks

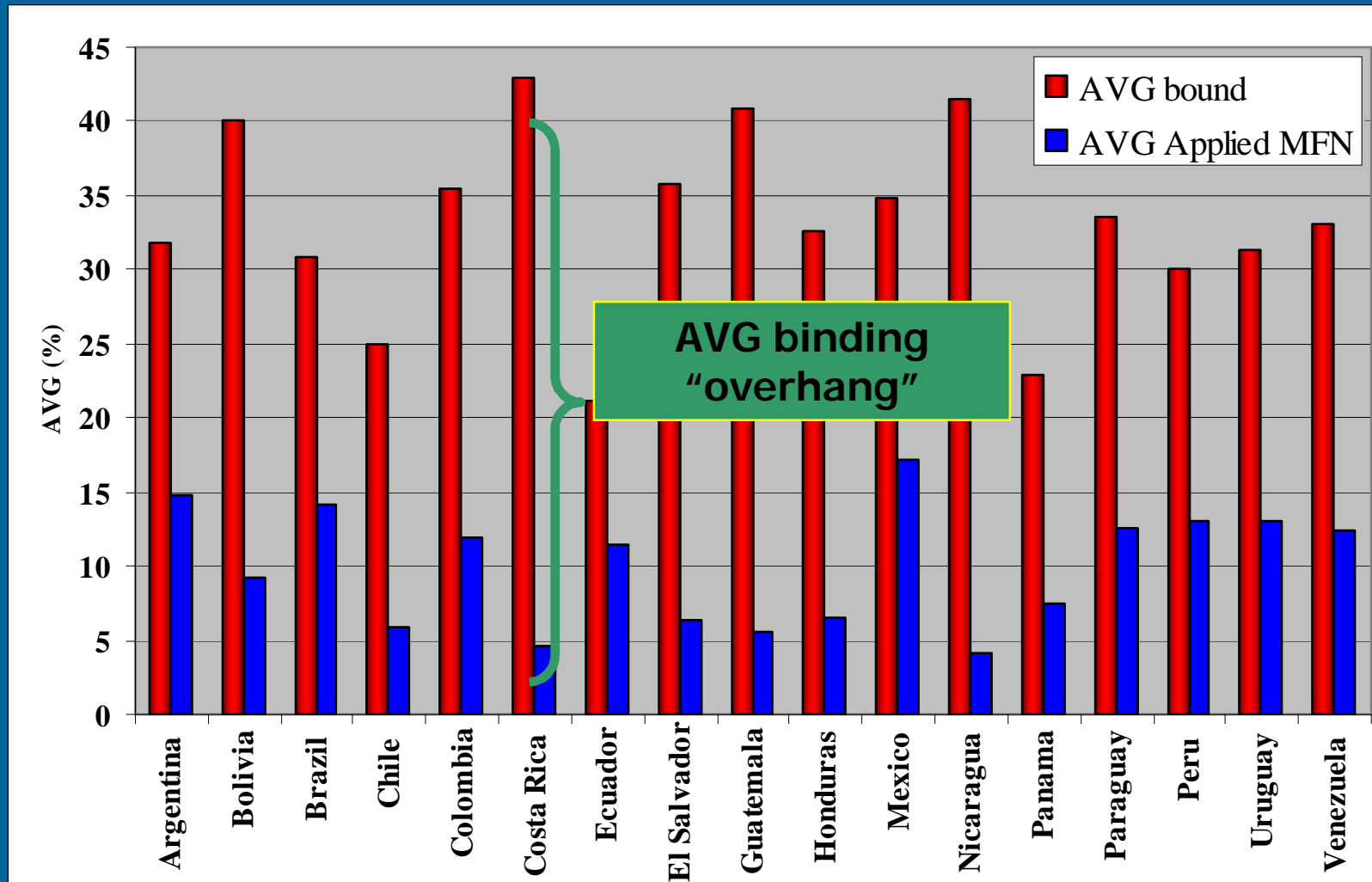
Import Markets	Total number of tariff lines	Share of bound tariff lines ^b	Share of bound duty-free tariff lines	Share of unbound duty-free tariff lines	Share of non- <i>ad valorem</i> tariff lines	Simple average bound tariff	Standard deviation	Share of tariff lines with duties more than three times the average	Share of tariff lines with duties above 15%
NORTH AMERICA									
Canada	6261	99.6	34.5	0.1	0.3	5.2	5.0	5.8	5.8
United States	7872	100.0	39.4	0.0	4.2	3.9	5.6	7.5	3.5
LATIN AMERICA									
Brazil	10860	100.0	0.5	0.0	0.0	30.0	7.4	0.0	97.4
Mexico	11255	100.0	0.0	0.0	0.0	34.8	3.4	0.0	99.3
EUROPE									
European Union	7635	100.0	26.9	0.0	0.5	4.1	4.0	2.6	1.5
Poland	4354	95.8	2.2	0.0	0.0	10.4	5.2	1.2	13.3
Turkey	15479	36.3	1.4	0.8	0.1	42.6	36.7	3.5	73.9
Switzerland	6217	98.9	17.2	0.0	82.8	1.8	4.6	8.7	0.3
ASIA									
Australia	5520	95.9	17.7	0.2	0.8	14.2	14.7	6.3	25.3
Hong Kong, China	5110	23.5	23.5	76.5	0.0	0.0	0.0	0.0	0.0
India	4354	61.6	0.0	0.4	1.1	58.7	33.3	0.1	97.8
Japan	7339	99.2	47.4	0.4	3.5	3.5	6.0	5.2	1.8
Korea, Republic of	8882	90.4	11.6	0.0	0.2	11.7	9.6	1.4	19.1
Malaysia	10832	61.8	1.6	2.8	3.2	17.2	13.4	0.4	58.3
Singapore	4963	65.5	15.2	33.8	0.2	4.6	4.8	0.5	0.2
Thailand	5244	67.9	0.0	1.2	19.7	27.5	10.6	0.1	87.1

^a Excluding petroleum, as defined in the technical notes at the end of this chapter.

^b All shares are expressed as a percentage of the total number of industrial tariff lines (column 1).

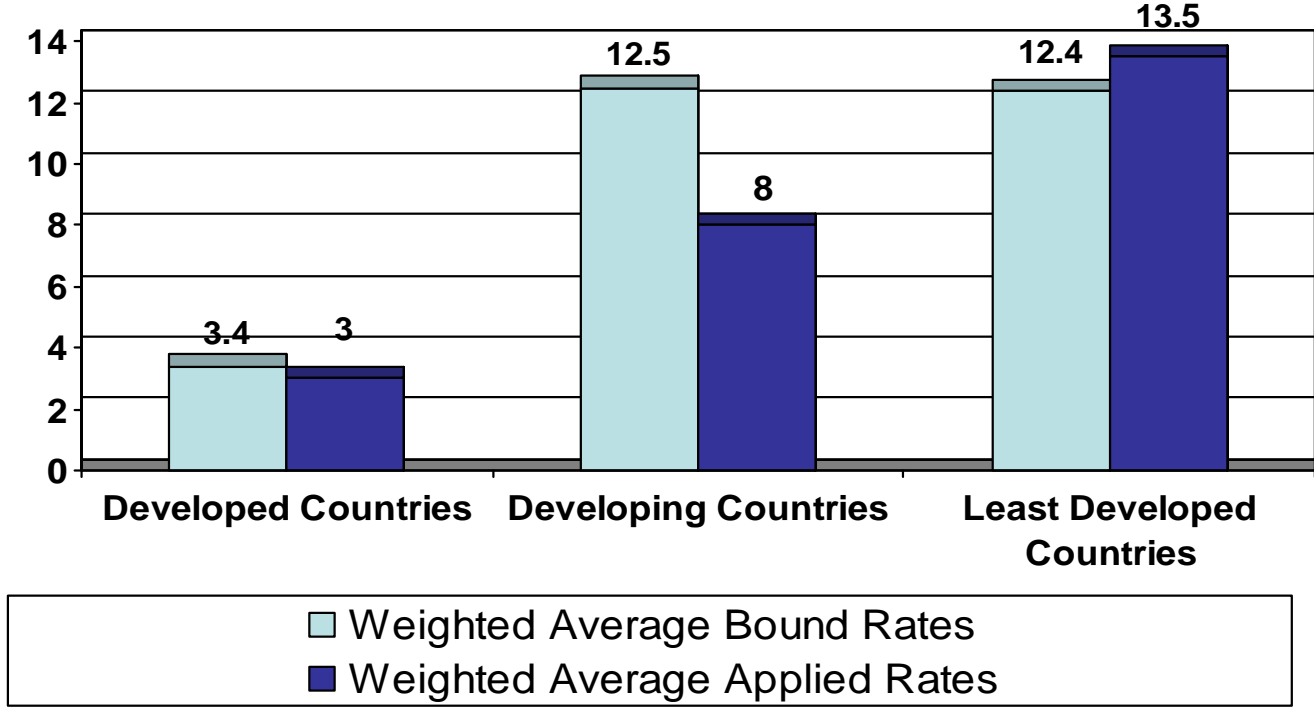
Source: WTO (2001)

Bound vs. Applied industrial tariffs Latin America



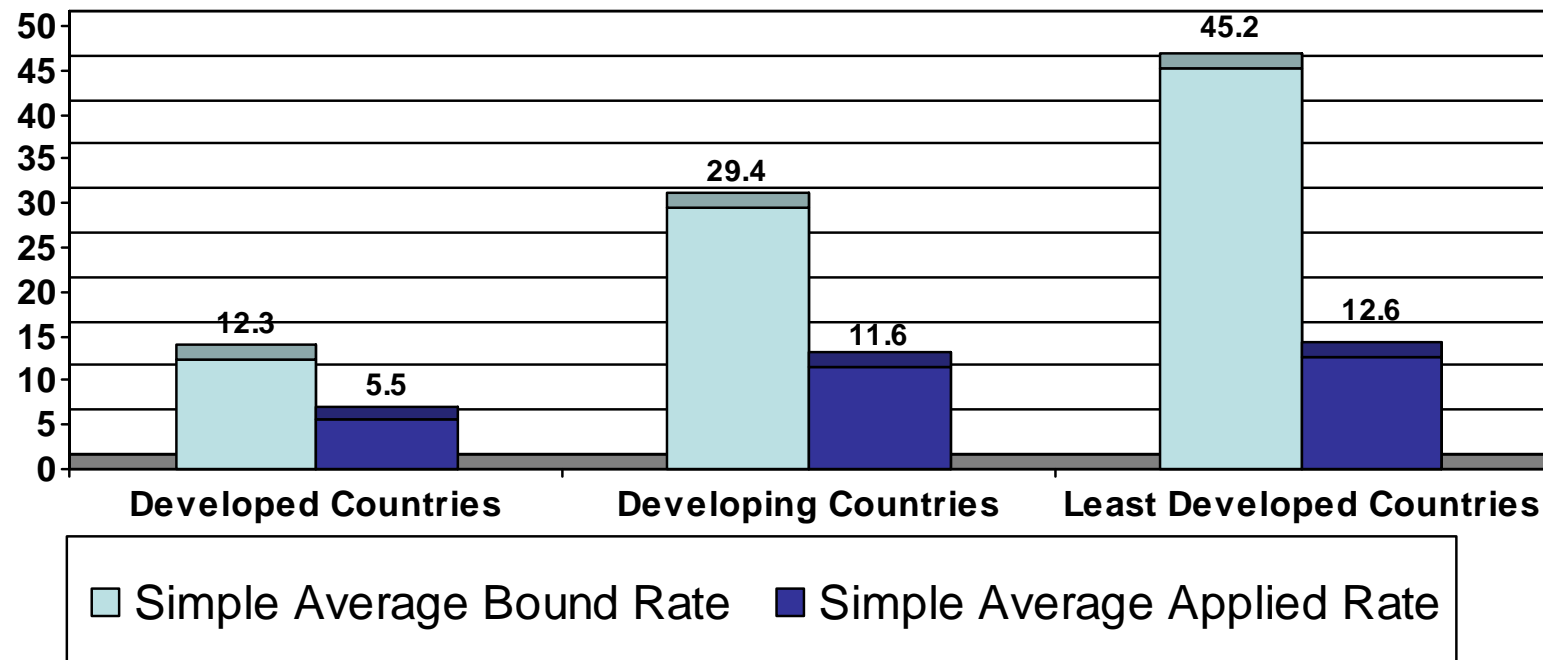
Source: WTO Secretariat based on CTS for bound and IDB and UNCTAD for the MFN applied tariffs.
Fuente: Non-agricultural market access negotiations. Marc Bacchetta ERSD WTO

Figure: Trade Weighted Bound and Applied Average Industrial Tariffs



Source: UNCTAD and WTO database.

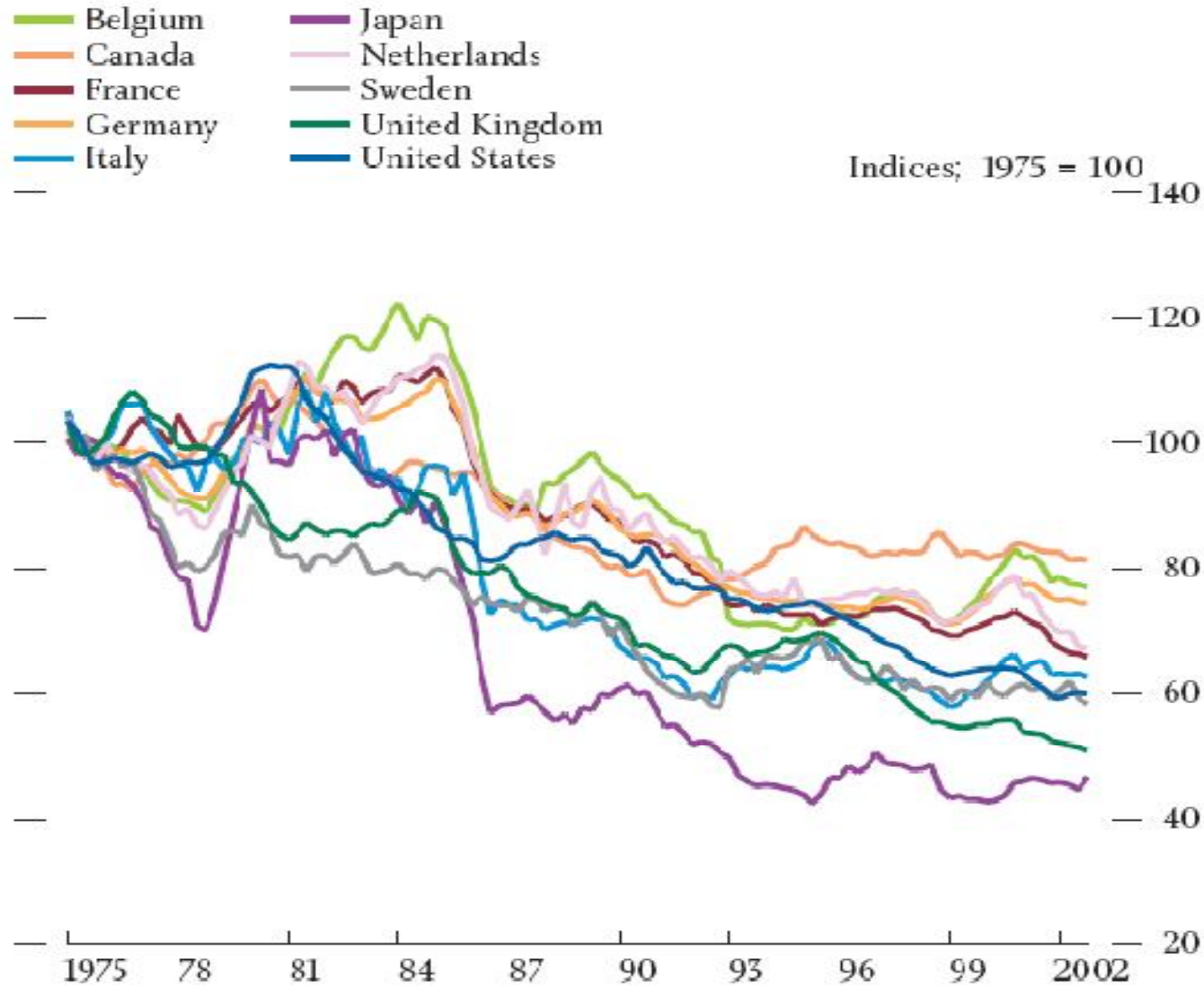
Figure: Simple Bound and Applied Average Industrial Tariffs



Source: UNCTAD and WTO database.

Mayor productividad de los bienes transables: caída de precios

Price of tradable goods relative to whole-economy prices



Source: Thomson Financial Datastream.



Transport, insurance and freight costs as a share of total import costs

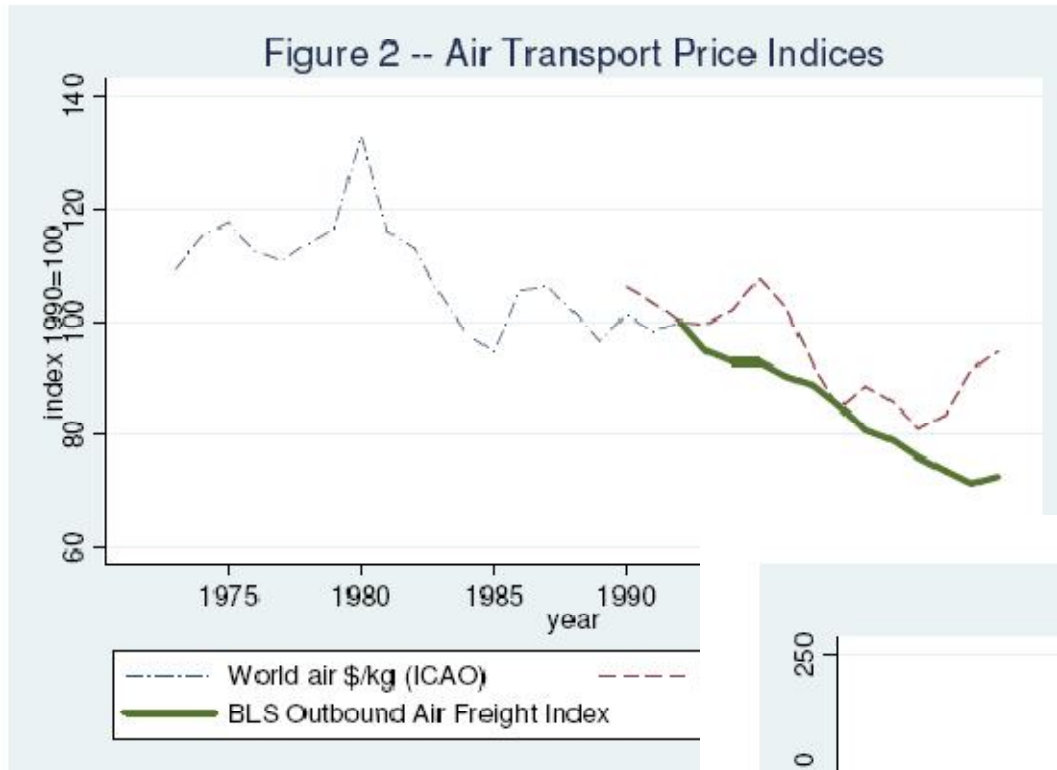


Sources: Bank of England estimates and IMF *International Financial Statistics* (1995).

Reducción de los costes del transporte y las comunicaciones

Costes en US\$ constantes de 1990			
	Flete marítimo	Flete aéreo	Llamada tf. trasatlántica
1920	95		
1930	60	0.68	244.65
1940	63	0.46	18.51
1950	34	0.30	53.20
1960	27	0.24	45.86
1970	27	0.16	31.58
1980	24	0.10	4.80
1990	29	0.11	3.32





Source: ICAO, "Survey of Air Fares and Rates", various years; BLS, "Outbound Air Freight Index", various years; <http://www.bls.gov/mxp/>

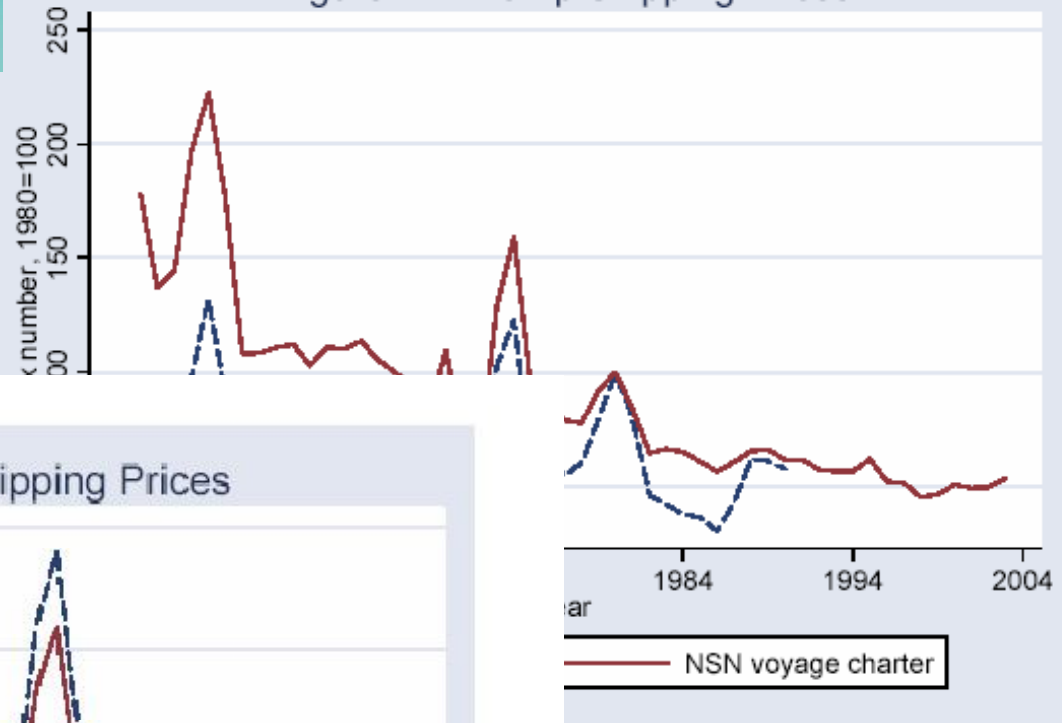


Source: UNCTAD "Review of Maritime Transport" various years

Transportation Costs and International Trade Over Time

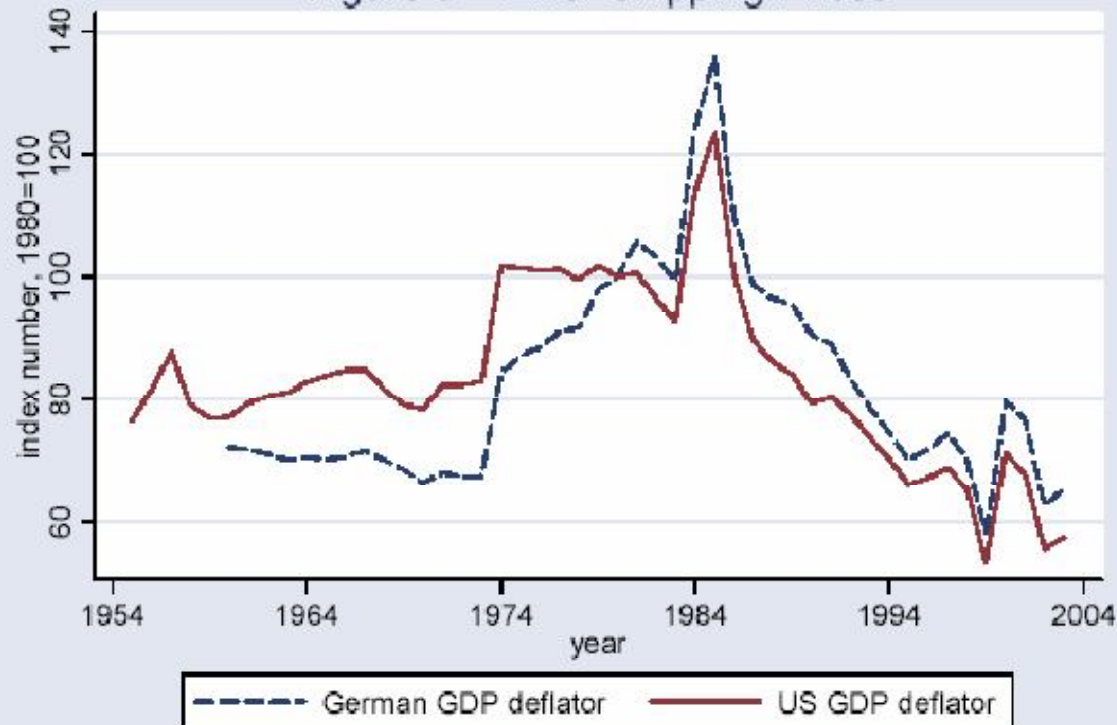
David Hummels

Figure 2 -- Tramp Shipping Prices



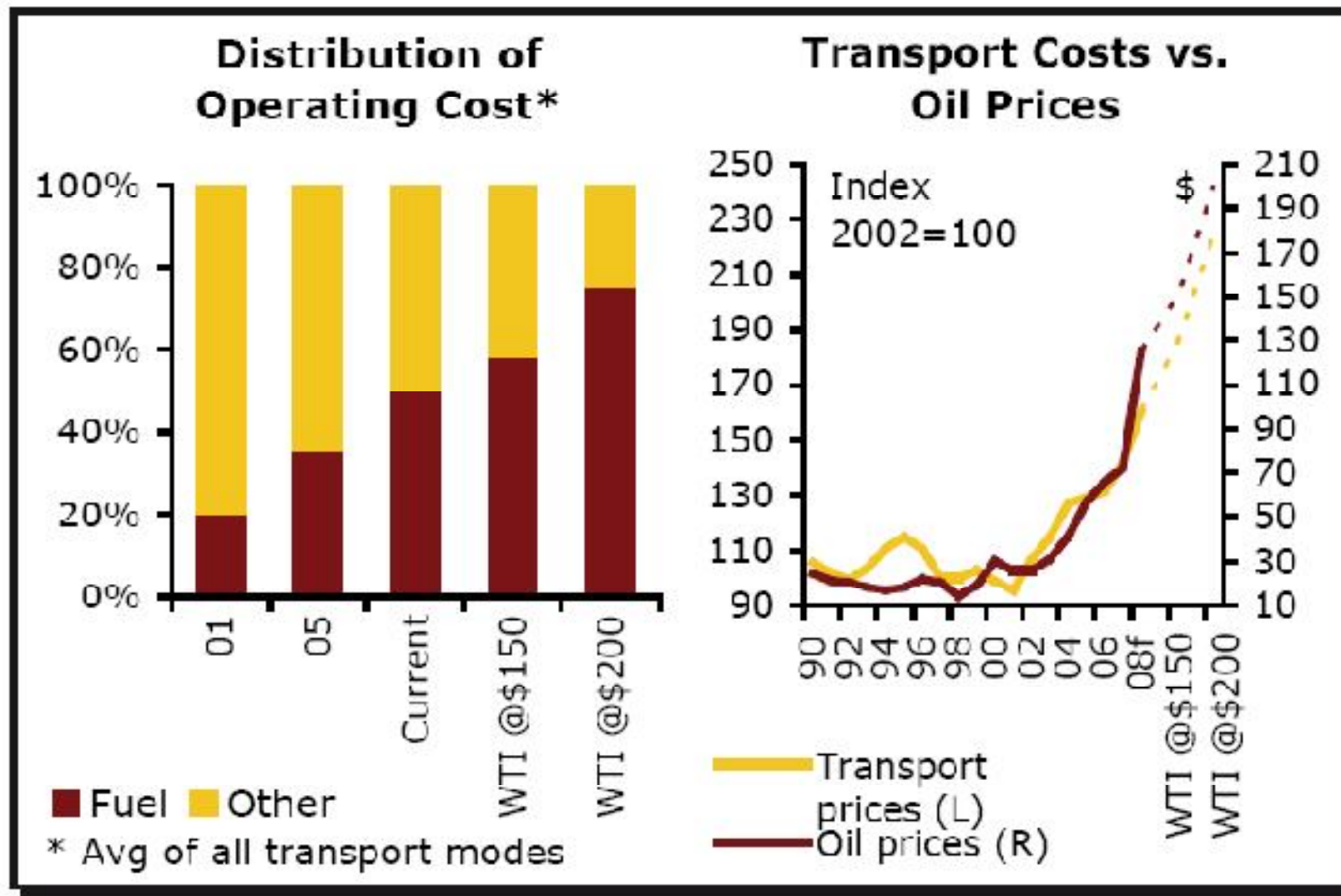
© ECMT, 2006

Figure 3 -- Liner Shipping Prices



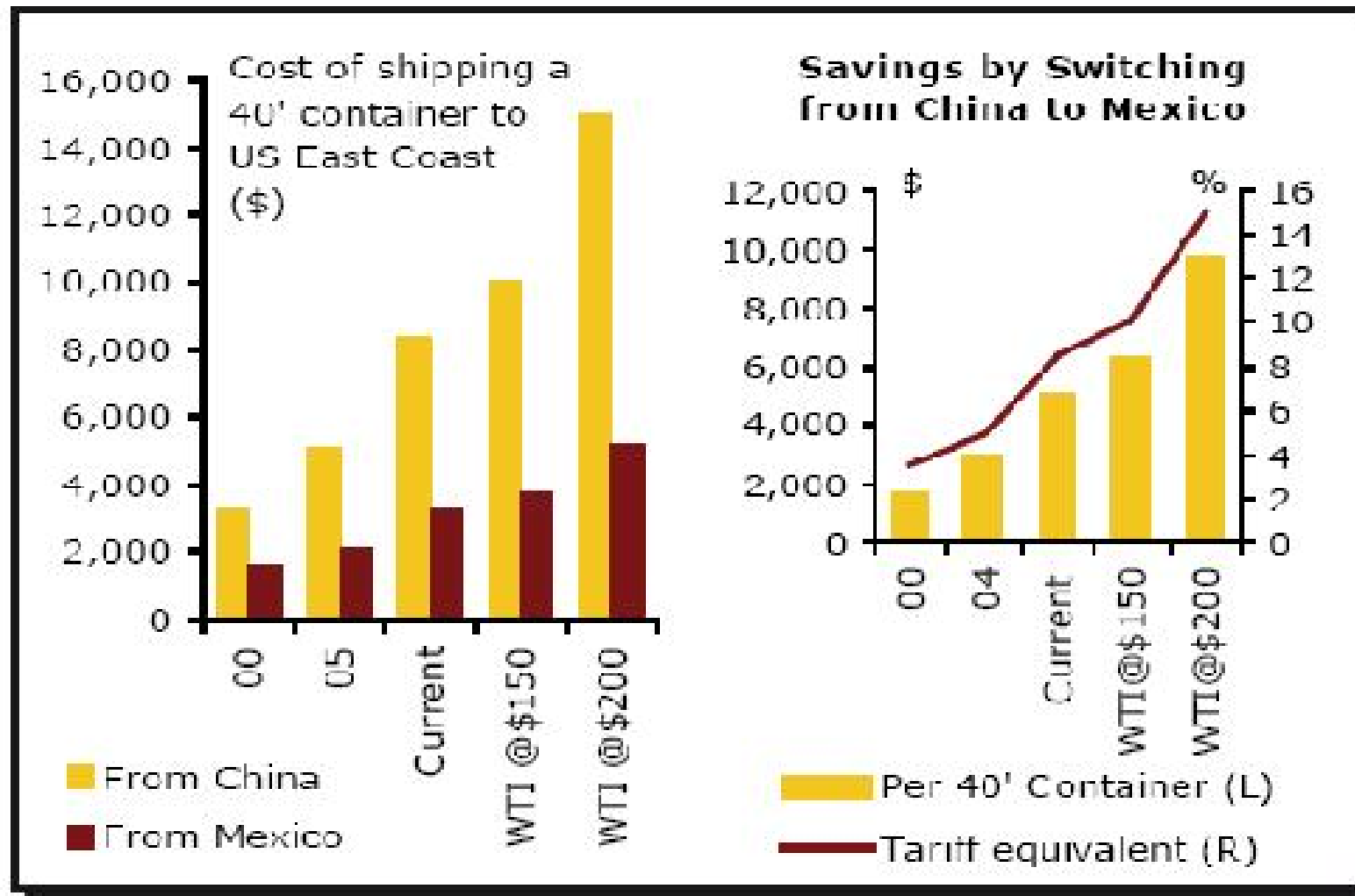
**TRANSPORT AND
INTERNATIONAL
TRADE**

Transport Costs Highly Sensitive to Oil Prices



Source: RMT, CIBCWM

Relative Shipping Costs to the US East Coast: Mexico versus East Asia



Menor Volatilidad tipos de cambio

Average annual variance of daily nominal effective exchange rate

	<u>1980s</u>	<u>1990s</u>	<u>2000–03 (a)</u>
Belgium	1.79	1.39	0.40
Canada	2.02	3.20	4.92
France	3.57	1.47	0.58
Germany	2.02	2.03	0.80
Italy	3.91	4.60	0.29
Japan	12.47	42.54	11.24
Netherlands	1.60	1.30	0.51
Sweden	9.71	4.98	2.64
United Kingdom	17.44	8.19	2.34
United States	24.90	7.30	13.63

Source: Bank of England.

(a) For the euro-area countries' exchange rate the last year available is 2002.



Índice

3. ¿Cuáles son los efectos de la globalización?



La globalización es muy controvertida.

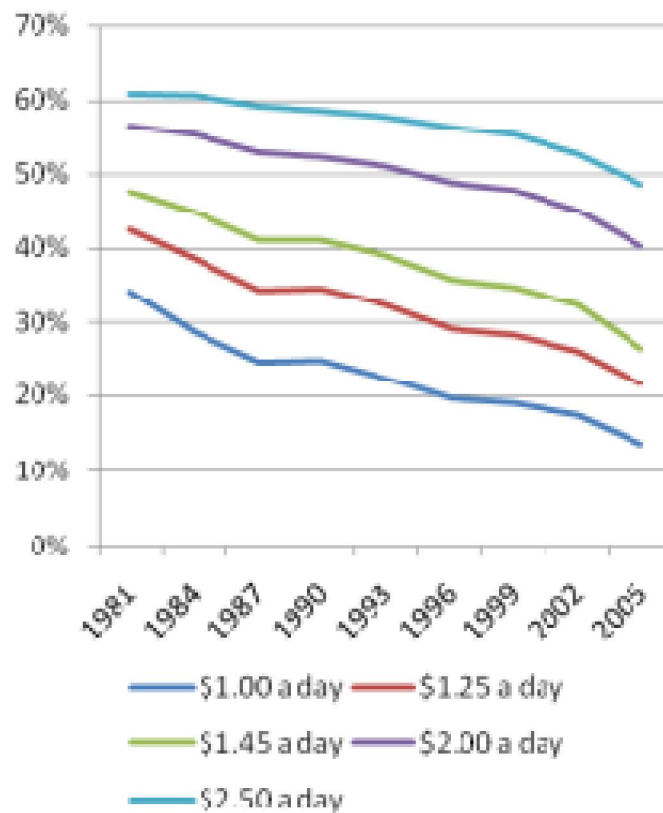
Las 4 principales críticas:

- Aumenta la pobreza
- Aumenta la desigualdad
- Es insostenible ambientalmente
- Carece de gobernanza efectiva

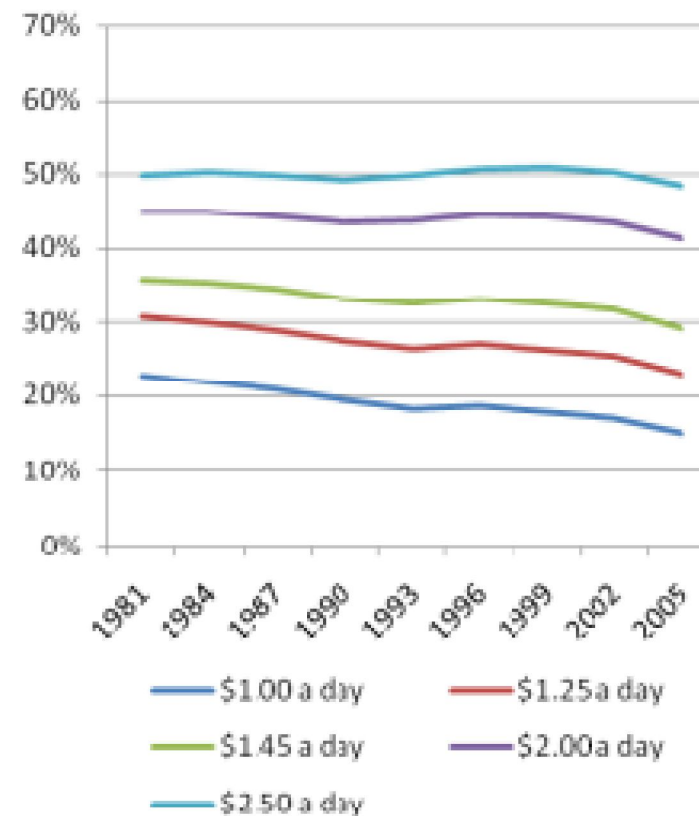


Casi toda la reducción de la pobreza se debe a China.
En poco más de dos décadas se ha reducido en 600 millones de personas
(del 85% al 15.9%)

**Poverty levels over time
world population (%)**



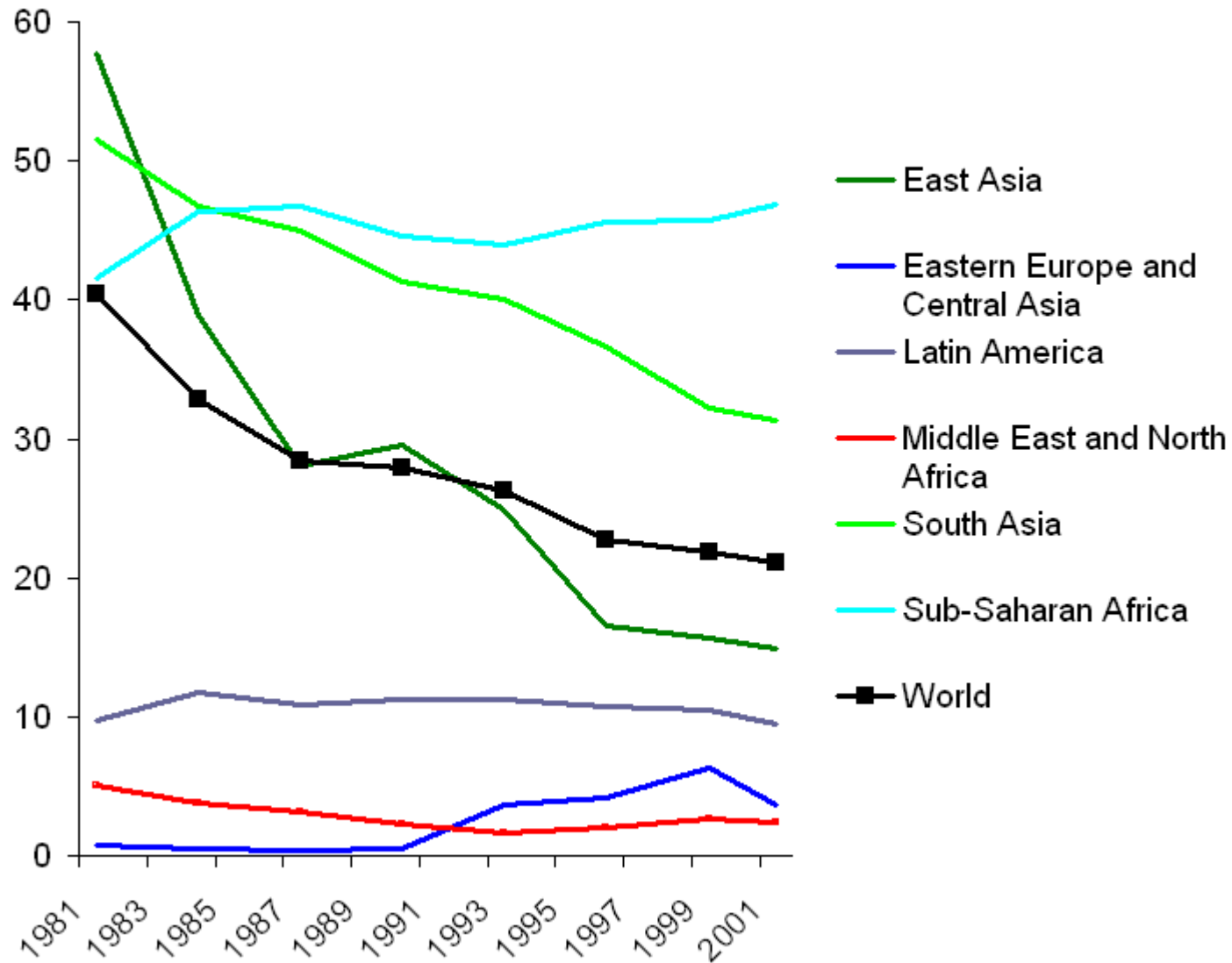
**Poverty levels over time
excluding China**



Source: World Bank Development Indicators 2008

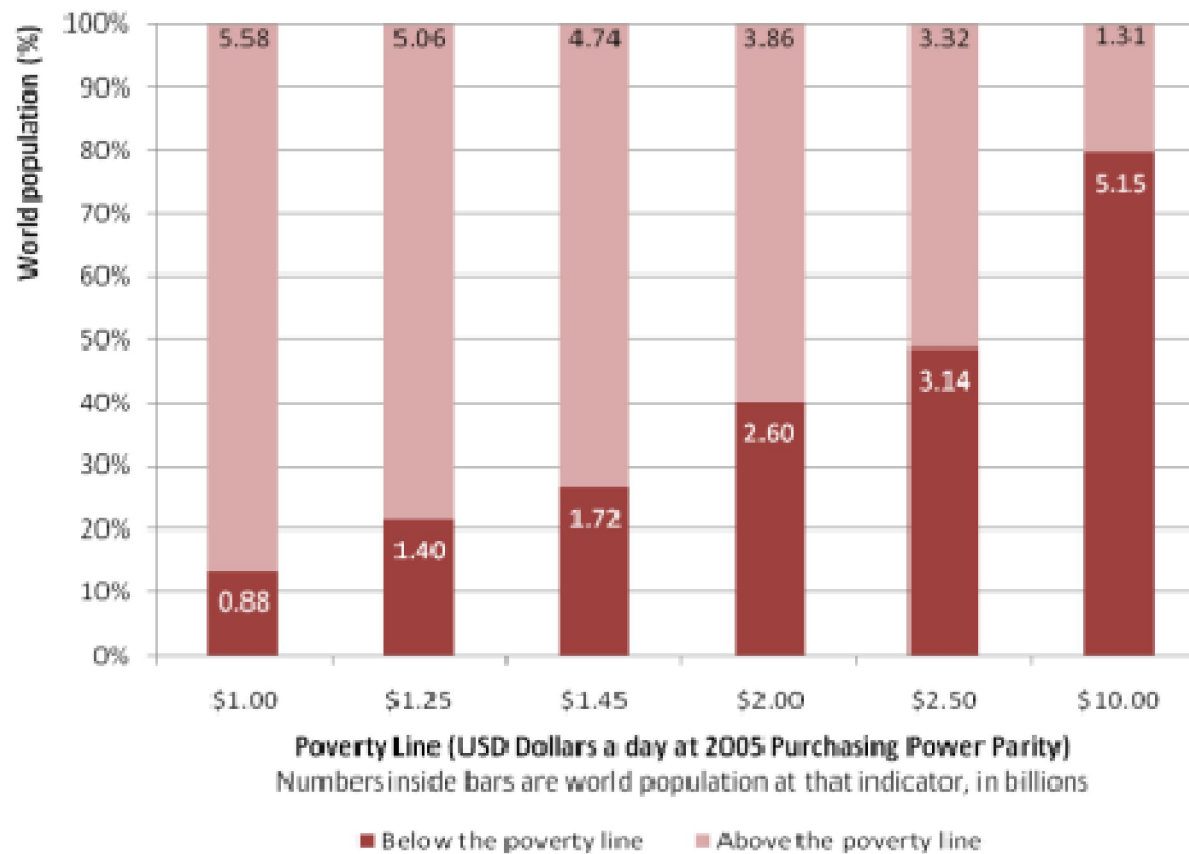


Percentage living on less than \$1 per day





Percent of people in the world at different poverty levels, 2005

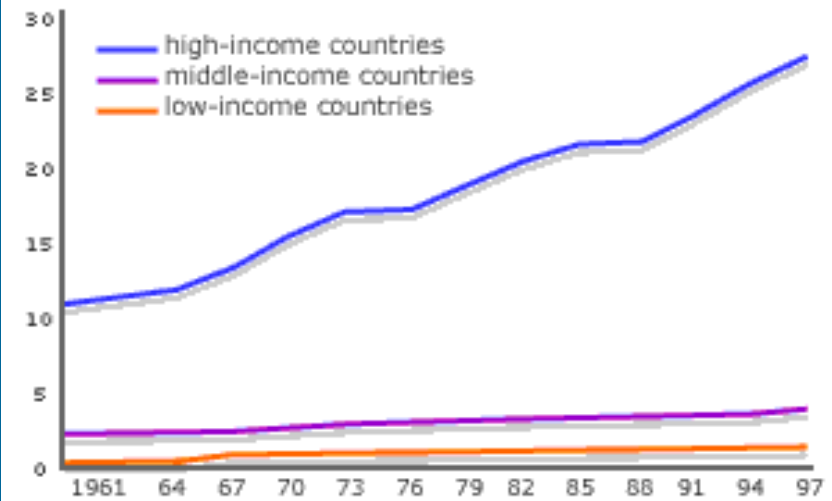


Source: World Bank Development Indicators 2008



Income Received by Rich and Poor Countries

GNP per capita (\$ thousands)

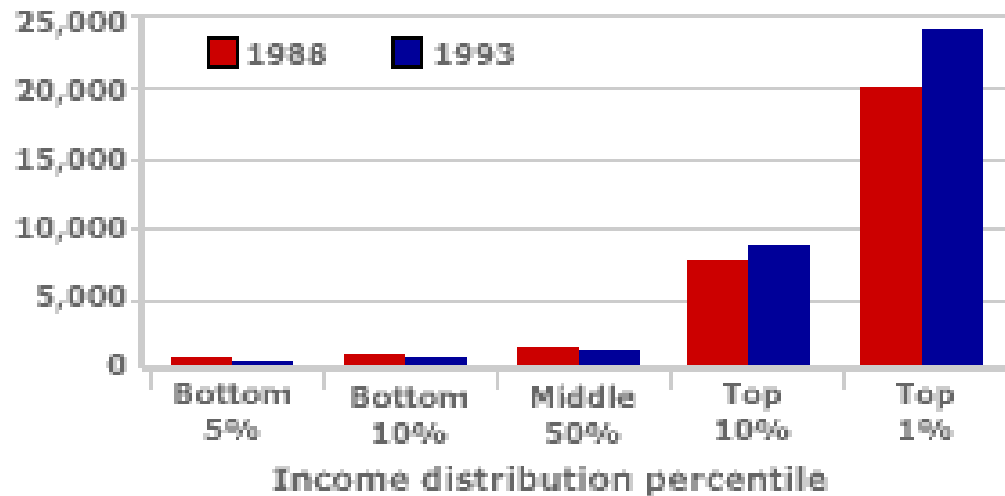


SOURCE: Unicef

World inequality

average yearly income received

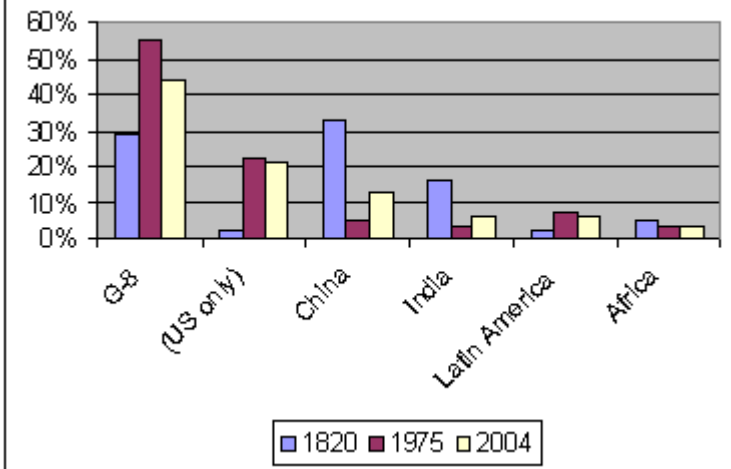
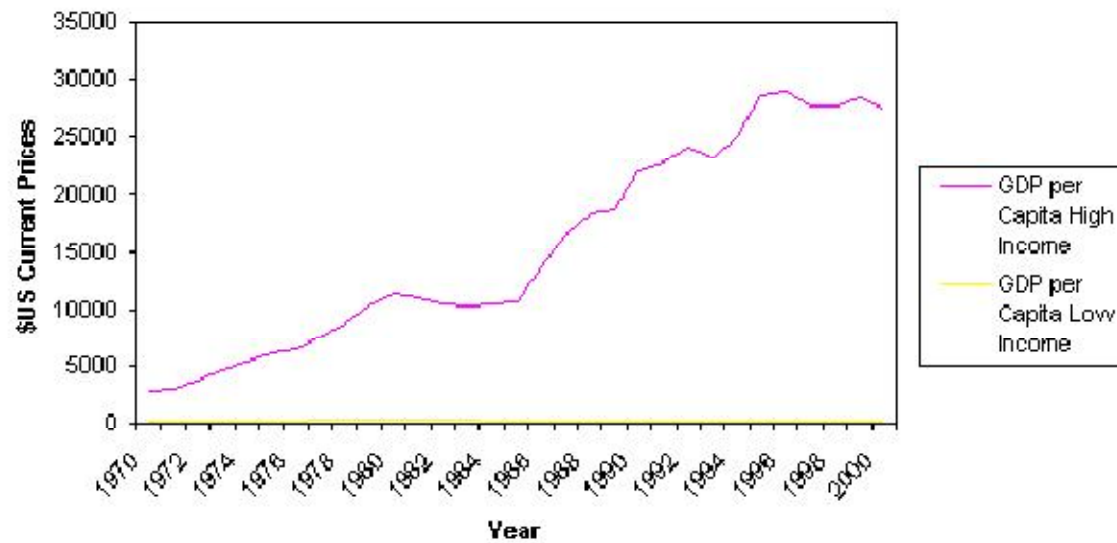
US \$ (real PPP)



SOURCE: Economic Journal, January 2002

Fuente: BBC News

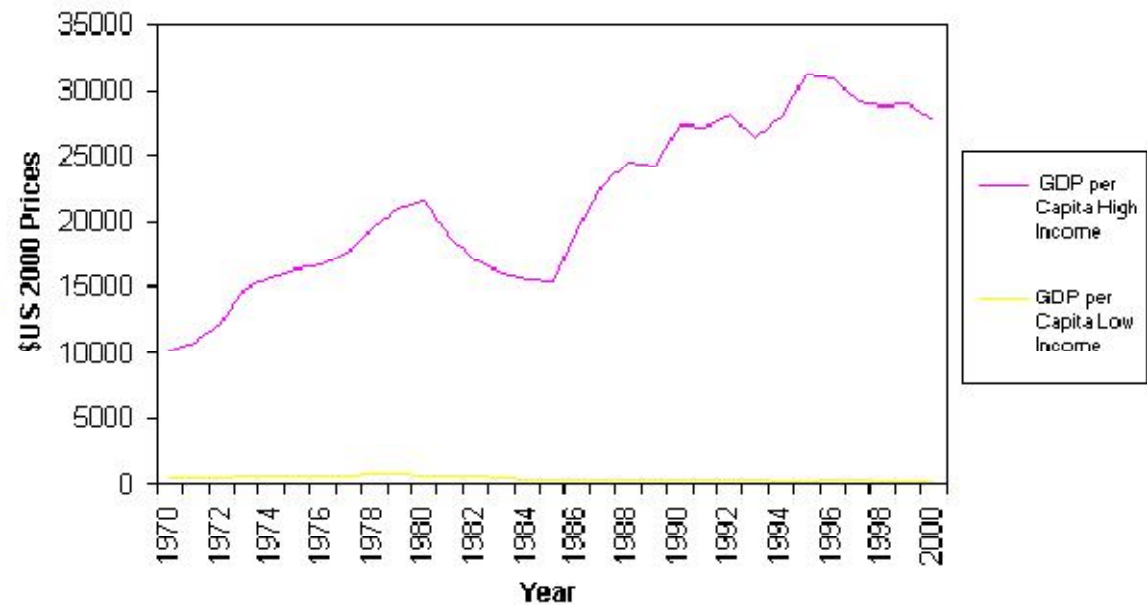
**Average GDP per Capita
in \$US Current Prices, 1970 - 2000**



	1820	1975	2004
G-8	29%	55%	44%
(US only)	2%	22%	21%
China	33%	5%	13%
India	16%	3%	6%
Latin America	2%	7%	6%
Africa	5%	3%	3%

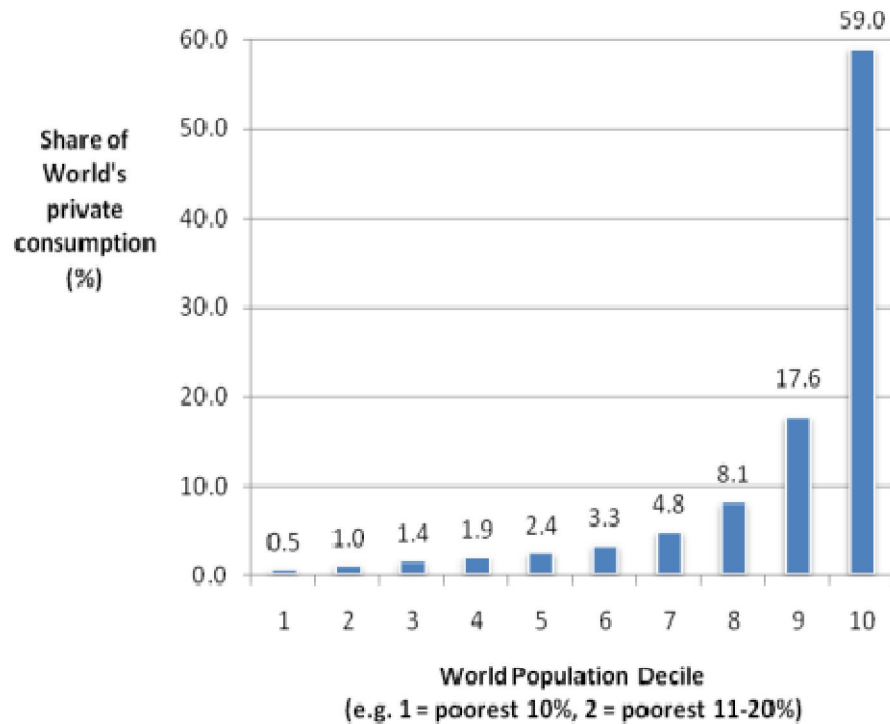
**Average GDP per Capita In 20 High Income
Countries And 20 Low Income Countries***
1970-2000

**Average GDP Per Capita
With \$US 2000 Price Deflator, 1970 - 2000**



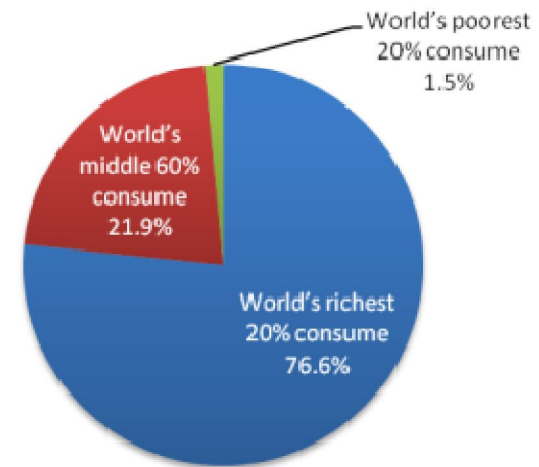


Inequality of Consumption, 2005



Source: World Bank Development Indicators 2008

Share of world's private consumption, 2005

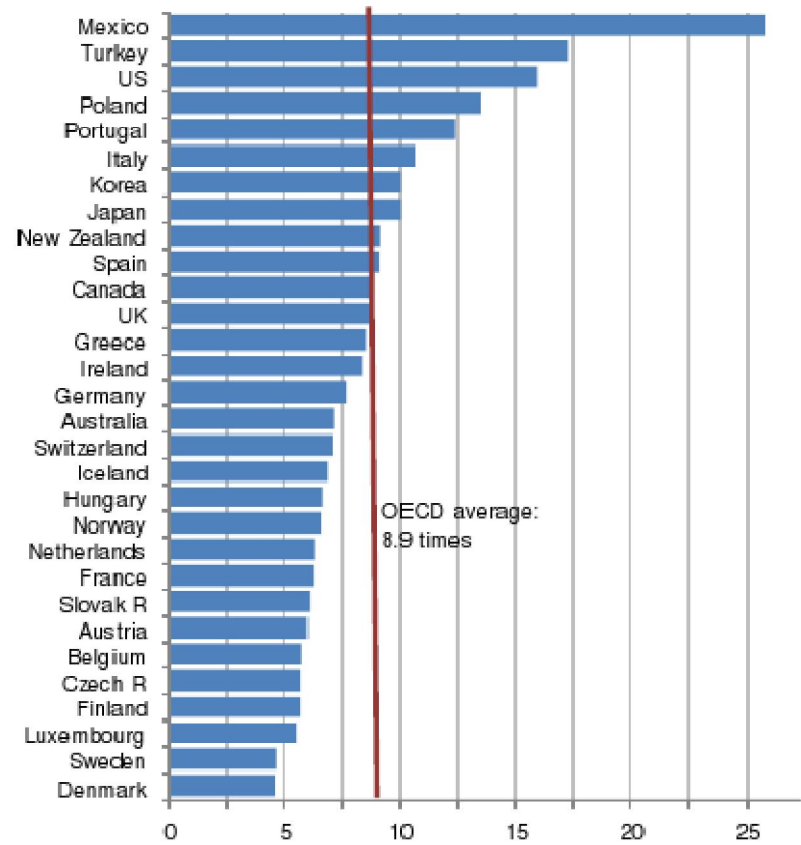


Source: World Bank Development Indicators 2008

Fuente:Poverty Facts and Stats

Global Issues

The gap between rich and poor in 2005



Average incomes of richest 10%, multiple of average incomes of poorest 10%

Source: *Growing Unequal?* OECD, 2008.

Income Distributions



Source: World Bank Development Indicators 2008

Fuente: Poverty Facts and Stats

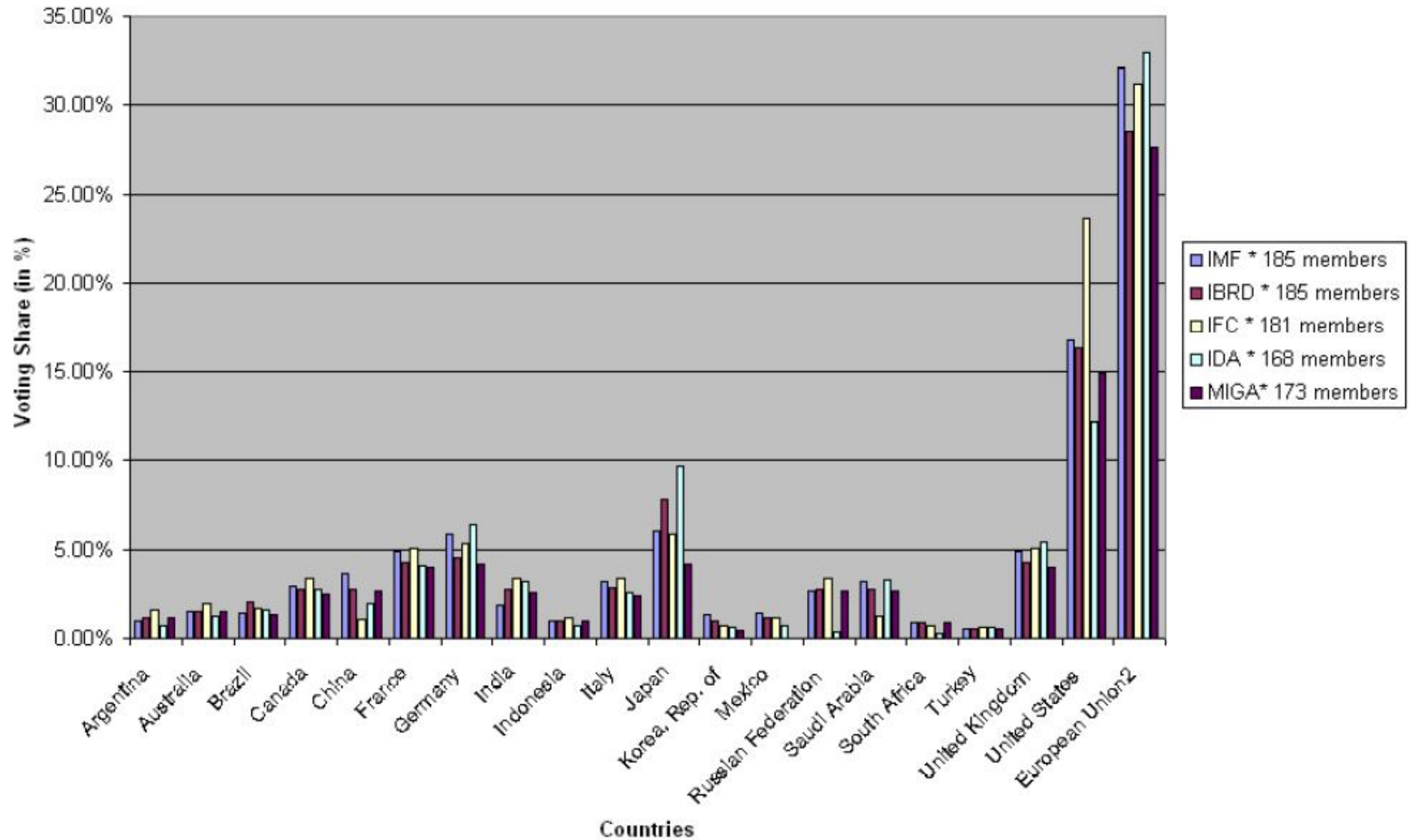
Global Issues



La gobernanza débil de la globalización

- Las que tienen más poder:
 - G-7, G-8 (G7+ RUS), G-20 (G8+ 11 Emergentes + UE) y OCDE (30 países)
 - Con Estados Unidos como gran potencia desde la II Guerra Mundial
 - Banco Mundial (erradicación de la pobreza)
 - Fondo Monetario Internacional (estabilidad económica)
 - Organización Mundial de Comercio (liberalización comercio)
- Otras:
 - Organizaciones de la ONU (estabilidad política/paz):
 - Programa de las Naciones Unidas para el Desarrollo (PNUD)
 - Conferencia de las Naciones Unidas para el Comercio y el Desarrollo (UNCTAD)
 - Organización para la Agricultura y la Alimentación (FAO)...
 - Bancos regionales de desarrollo:

Voting Share at the IMF and the World Bank



(Compiled by Monika Kamieniecka, GPF Associate)

Data Source: The World Bank, the IMF



Índice

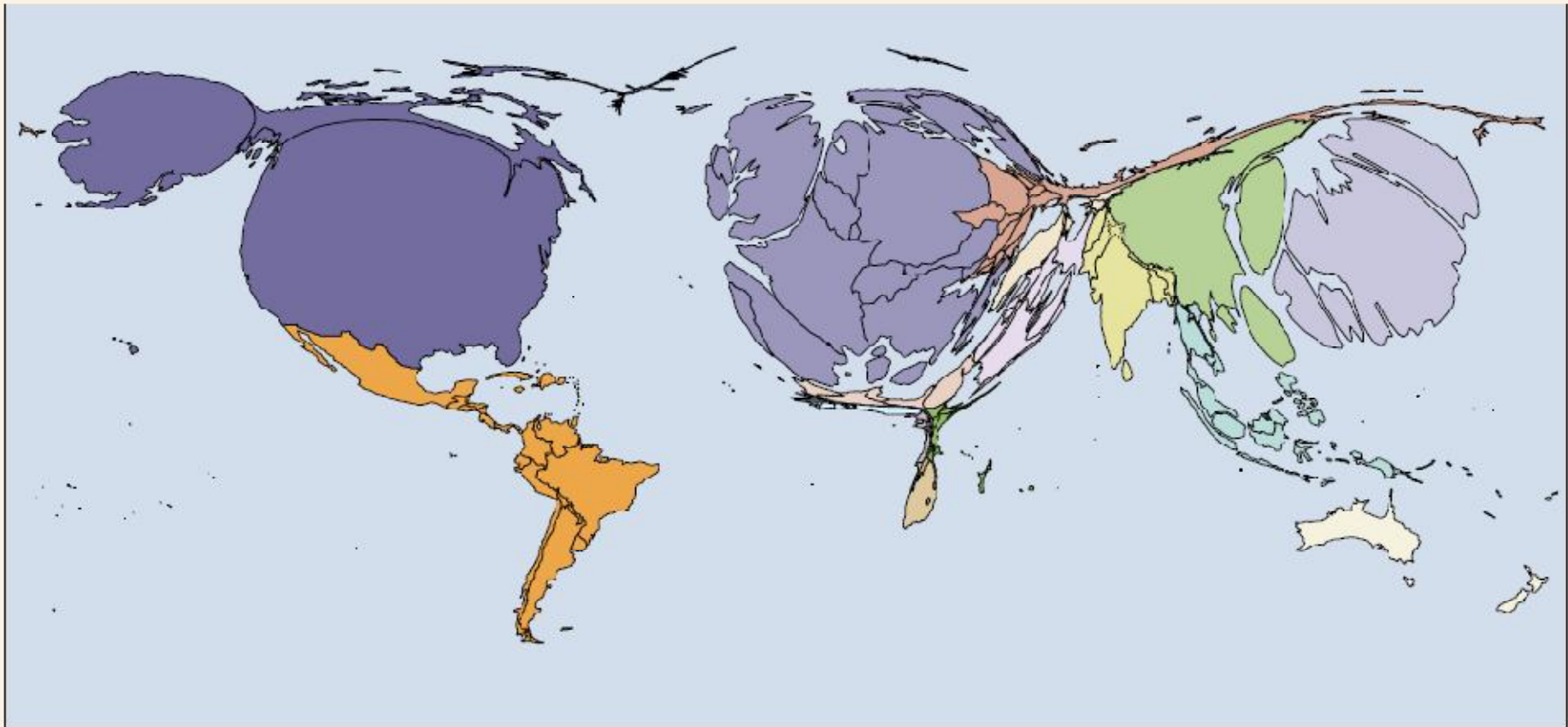
2. Comercio, transporte, logística y competitividad

0

Cómo ser competitivo en un mundo globalizado a través del transporte y la logística

El mundo económico

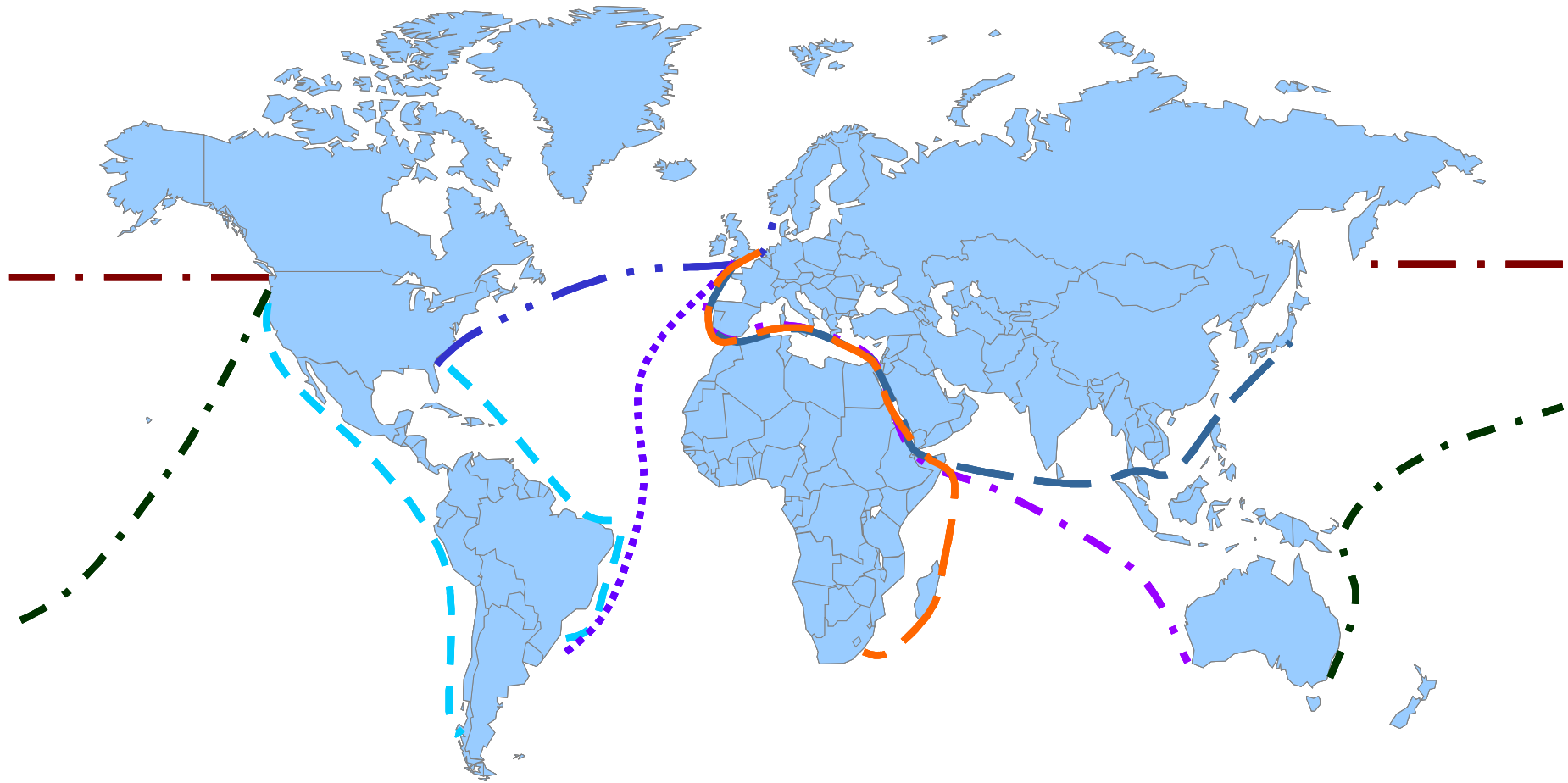
Mapa G0.4 El mundo, desde el punto de vista de los mercados
(el tamaño del país revela su proporción del producto interno bruto mundial)



Fuente: Equipo del IDM 2009, con datos del PIB de 2005 (en US\$ constantes).


Nota: Este cartograma se elaboró utilizando el método desarrollado por Gastner y Newman (2004). El mapa muestra los países de mayor riqueza, determinada al comparar los PIB luego de aplicar los tipos de cambio. Esto indica el poder adquisitivo internacional, es decir, lo que vale el dinero de alguien si se lo gasta en otro país.

Principales rutas comercio internacional



 Norte América – Sur América

 Transpacífico


 Europa – Sur América

 Norte América - Australia

 Transatlántico

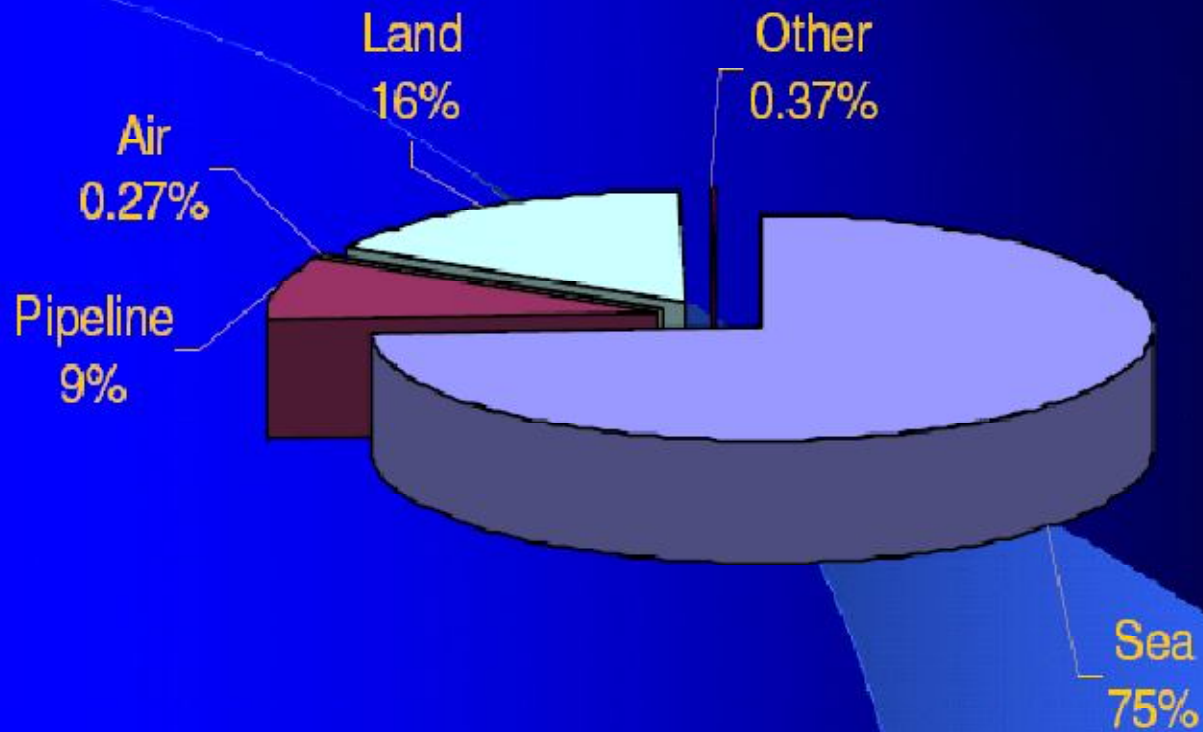
 Europa - Australia

 Europa – Este asiático

 Europa – Sureste de África

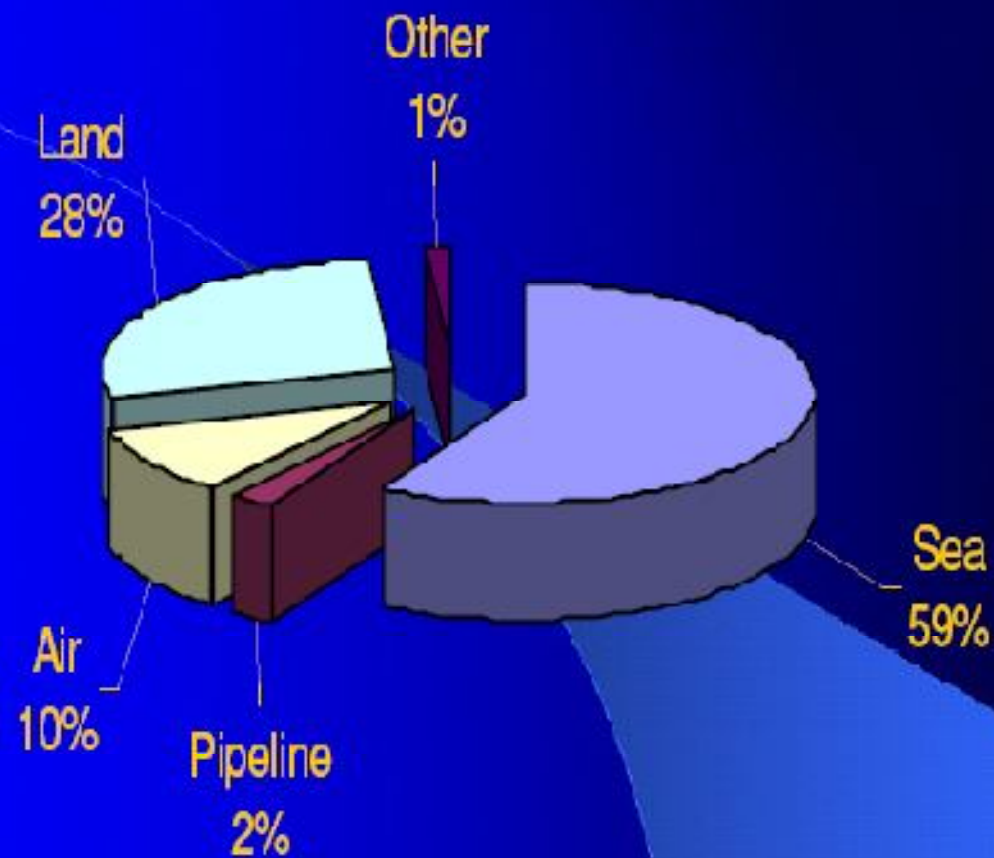
El transporte marítimo es la principal arteria del comercio internacional

World Trade Tonnes - 2006



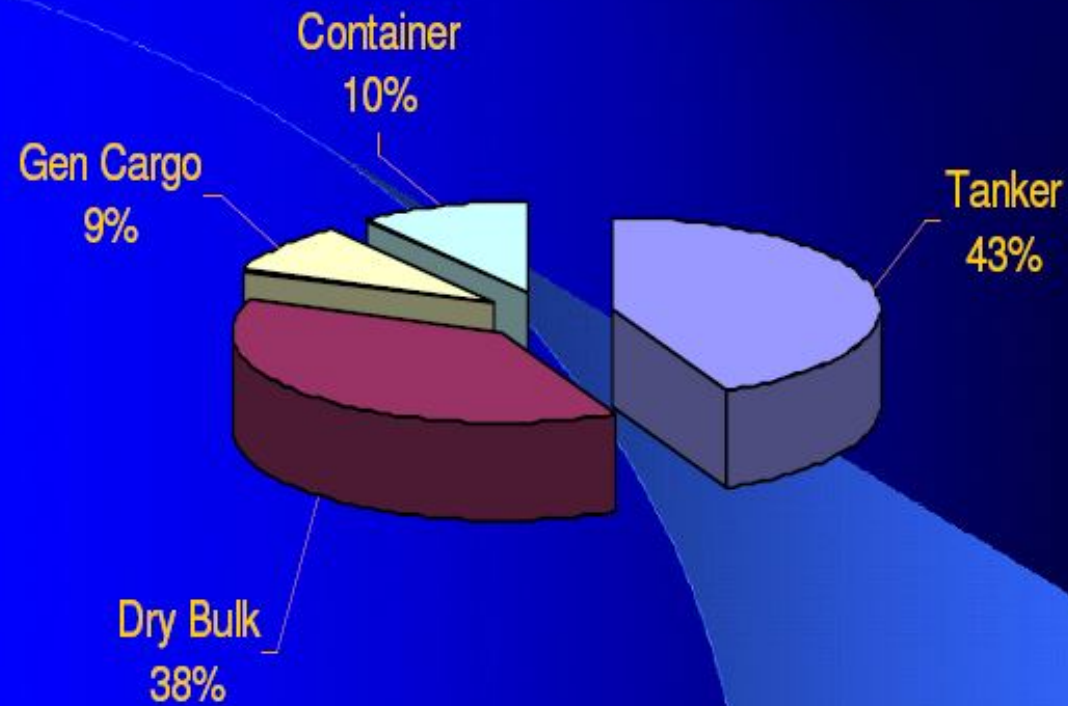
LLOYD'S MIU 

World Trade \$ Value



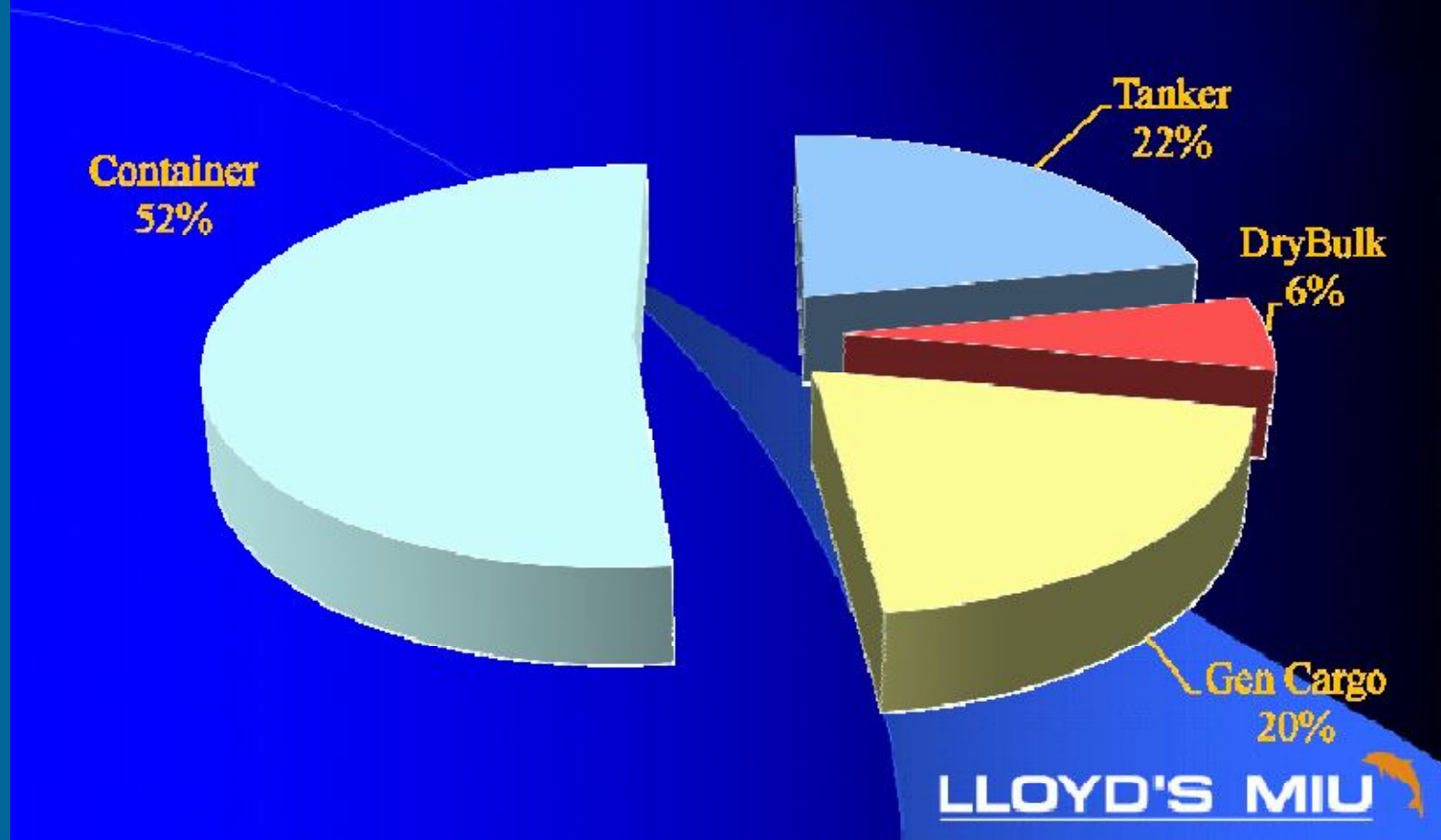
Los tráficos más cuantiosos son los gráneles...

Seaborne Trade - Tonnes



.. pero los más valiosos los contenedorizados...








Seaborne Trade - \$ Value



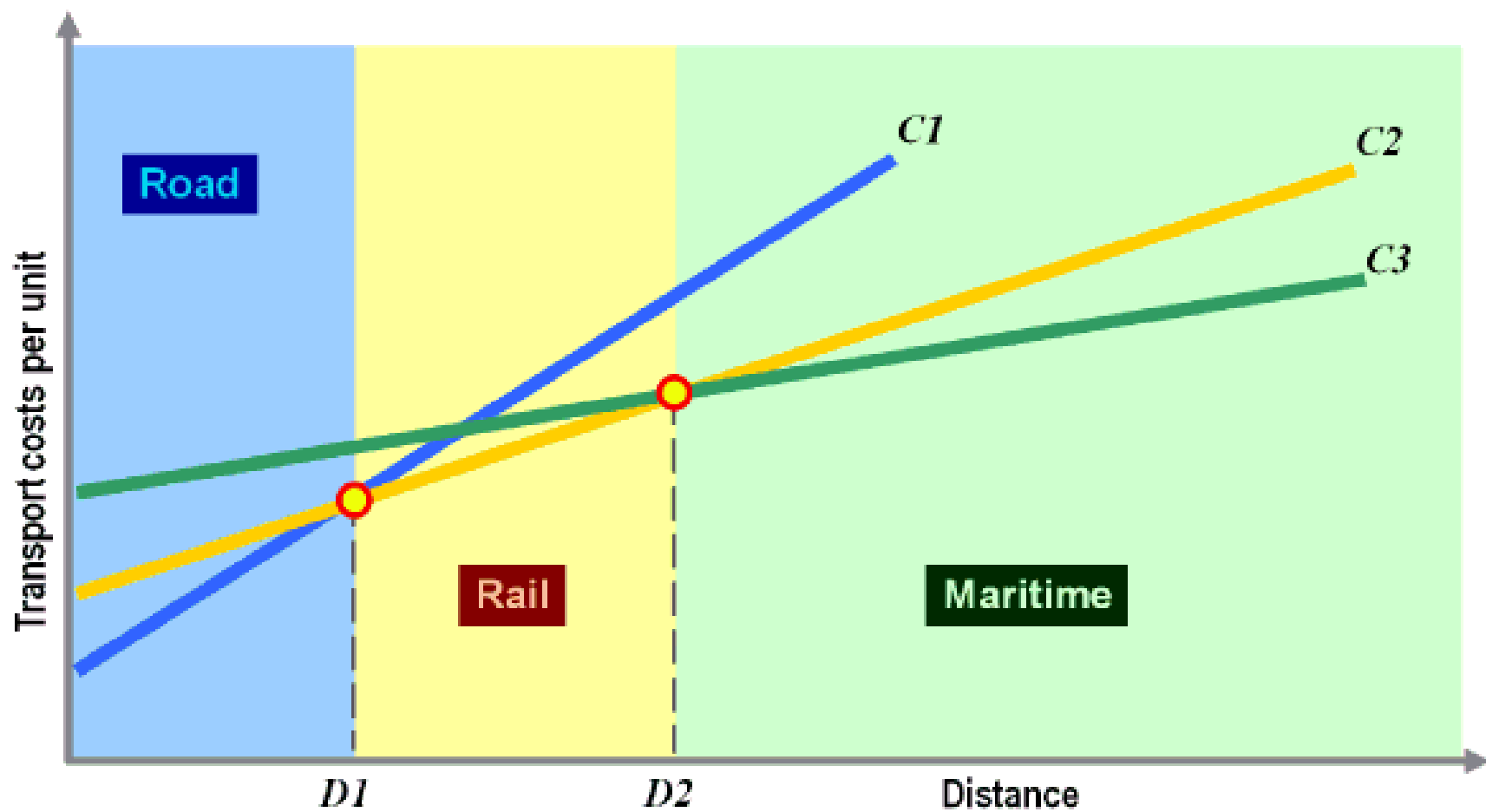
In mid-2008, there were more than 17.8 million containers in the world fleet, which cost the industry US\$ 80.1 billion to purchase.

De todos los modos de transporte internacional el marítimo es:

- El de mayor capacidad
- El más barato (grandes economías de escala)
- El menos contaminante

Vehicle	Capacity	Truck Equivalency
 Barge	1500 Tons 52,500 Bushels 453,600 Gallons	57.7 (865.4 for 15 barges in tow)
 Hopper car	100 Tons 3,500 Bushels 30,240 Gallons	3.8
 100 car train unit	10,000 Tons 350,000 Bushels 3,024,000 Gallons	384.6
 Semi-trailer truck	26 Tons; 910 Bushels 7,865 Gallons 9,000 for a tanker truck	1
 Panamax containership	5,000 TEU	2,116
 VLCC	300,000 tons 2 million barrels of oil	9,330
 747-400F	124 tons	5

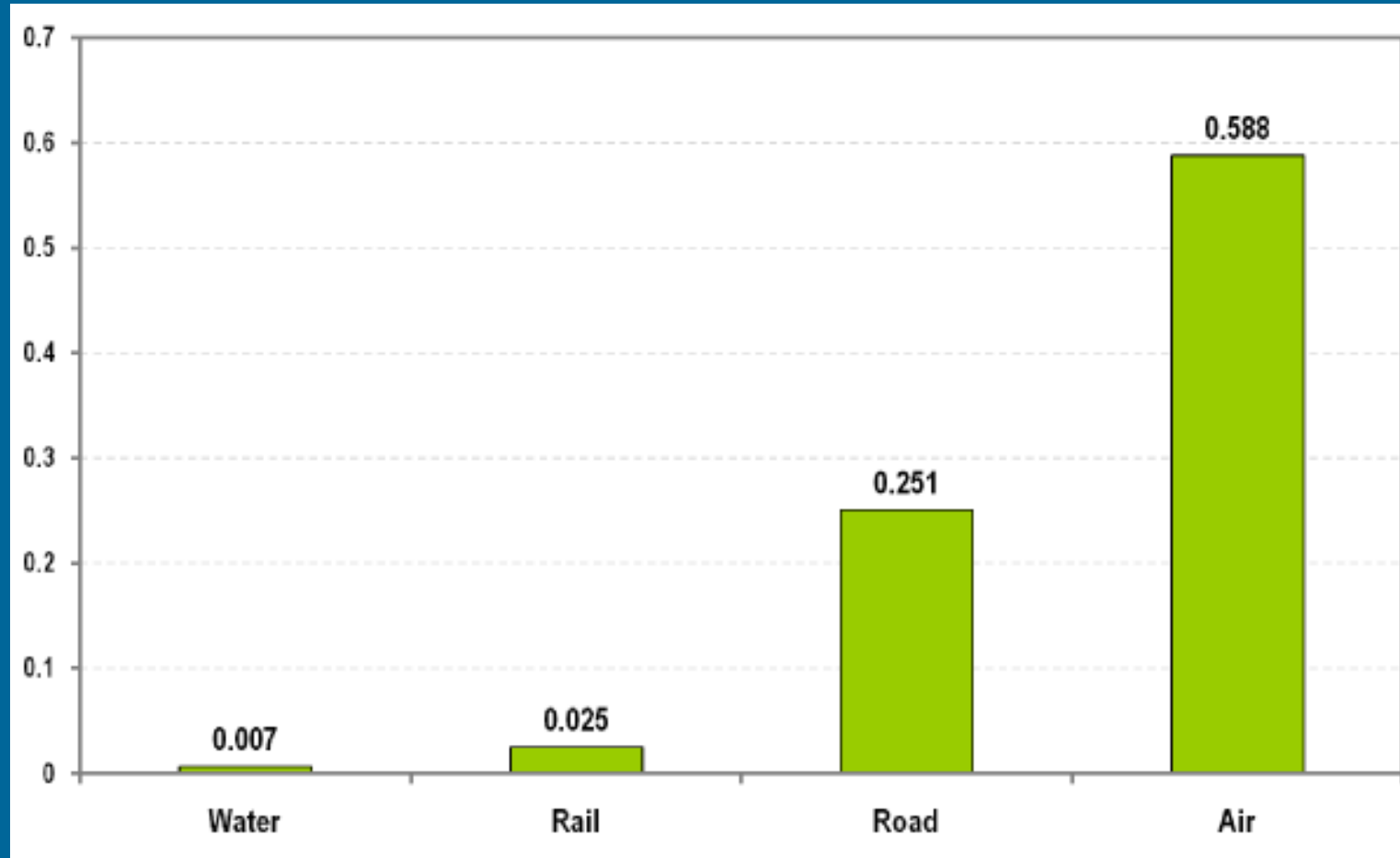
Fuente: THE GEOGRAPHY OF TRANSPORT SYSTEMS



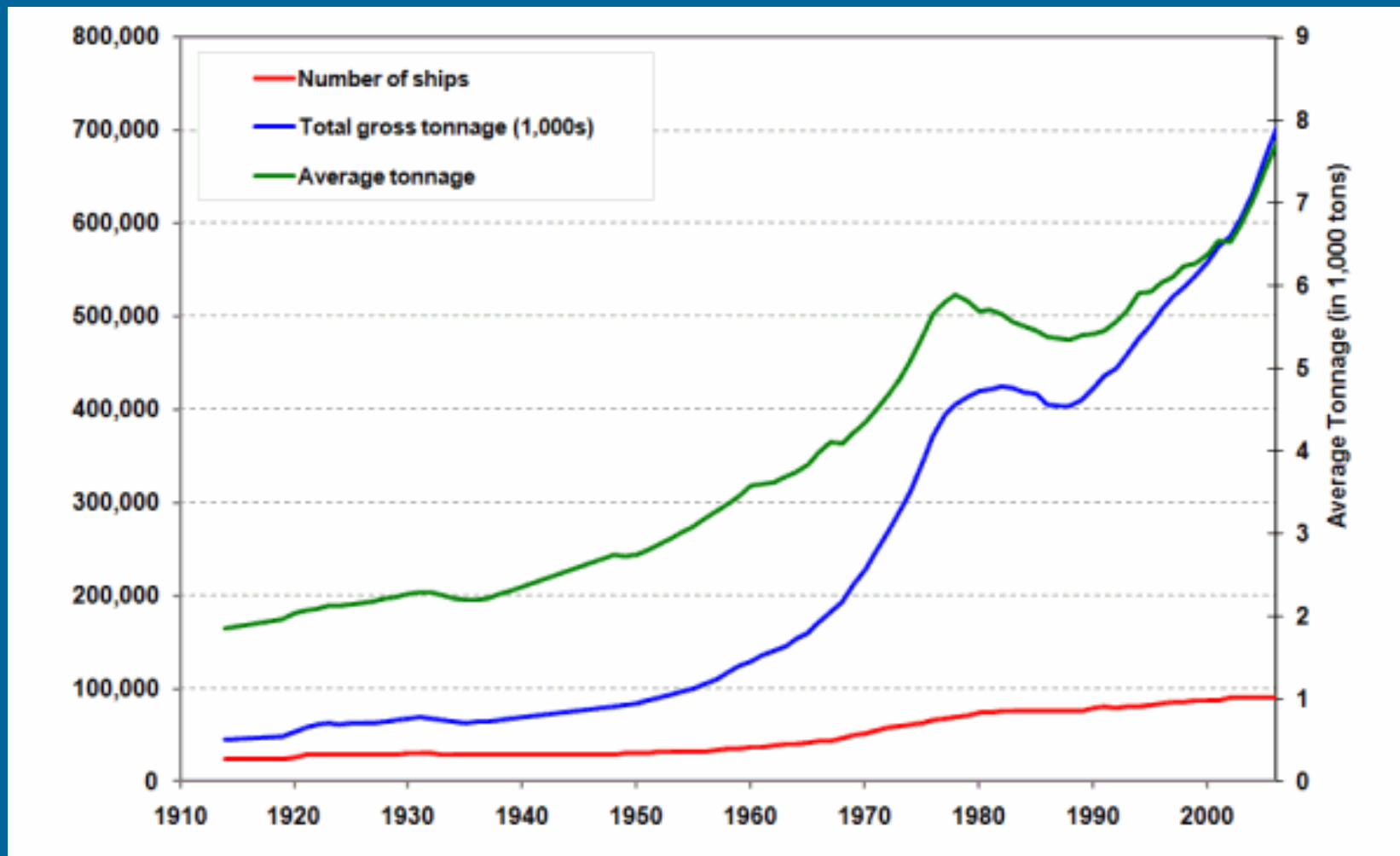
500-700 km.

1.500 km.

Freight Transport Costs in Cents per Ton-Mile











- Source: adapted from R. Ballou (1998) Business Logistics Management, 4th Edition, Upper Saddle River, NJ: Prentice Hall.



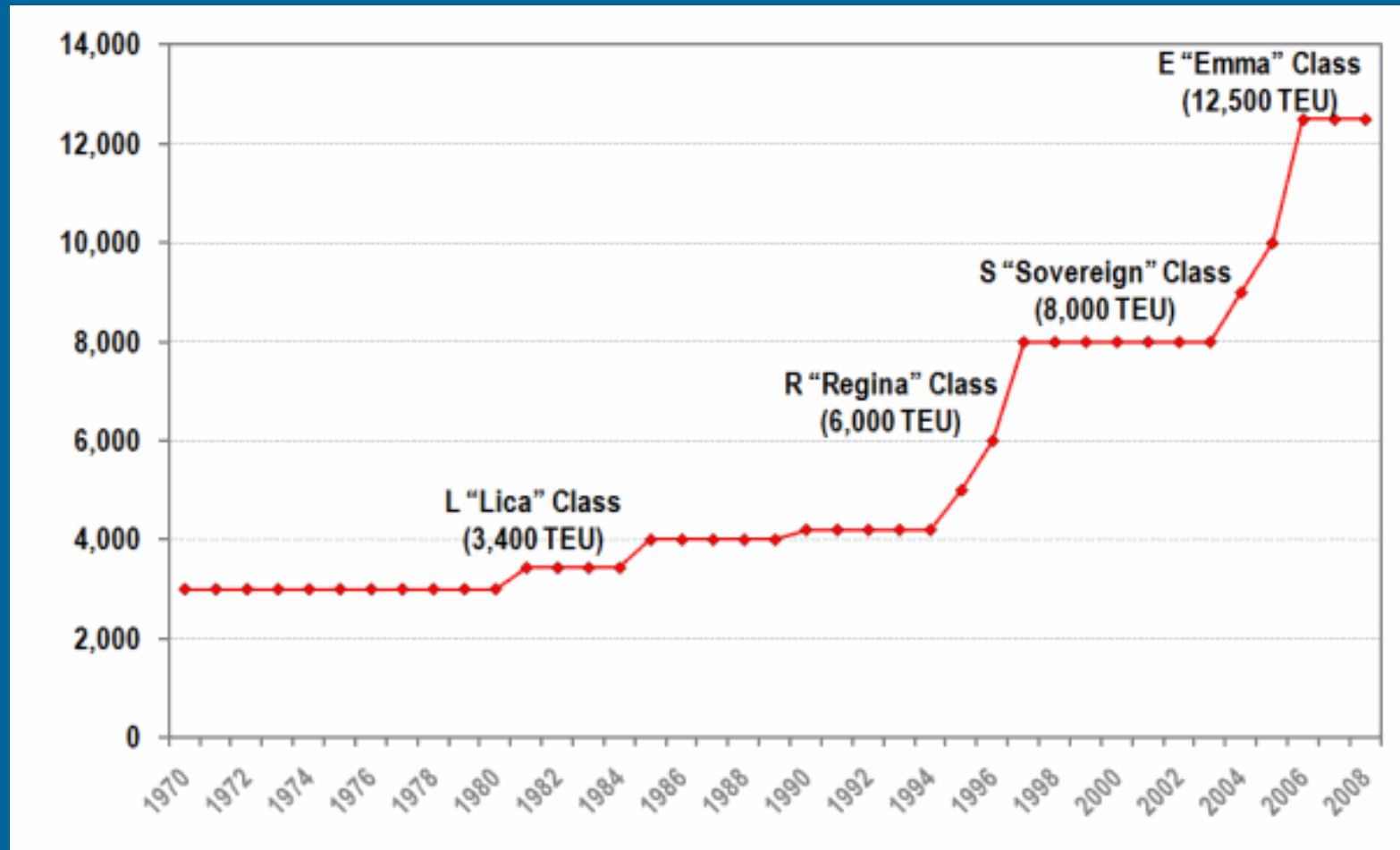
Registered World Fleet, 1914-2007

Seis generaciones de barcos portacontenedores

		Length	Draft	TEU
First (1956-1970)	 Converted Cargo Vessel	135 m	< 9 m	500
	 Converted Tanker	200 m	< 30 ft	800
Second (1970-1980)	 Cellular Containership	215 m	10 m 33 ft	1,000 – 2,500
Third (1980-1988)	 Panamax Class	250 m	11-12 m	3,000
		290 m	36-40 ft	4,000
Fourth (1988-2000)	 Post Panamax	275 – 305 m	11-13 m 36-43 ft	4,000 – 5,000
Fifth (2000-2005)	 Post Panamax Plus	335 m	13-14 m 43-46 ft	5,000 – 8,000
Sixth (2006-)	 New Panamax	397 m	15.5 m 50 ft	11,000 – 14,500

Economías de escala de barcos portacontenedores





The Largest Available Containership, 1970-2008 (in TEUs)

Typical Ocean Freight Costs (Asia-US or Asia-Europe)

	Unit	Typical Shelf Price	Shipping Costs
 TV Set	1 unit	\$700.00	\$10.00
 DVD/CD Player	1 unit	\$200.00	\$1.50
 Vacuum Cleaner	1 unit	\$150.00	\$1.00
 Scotch Whisky	Bottle	\$50.00	\$0.15
 Coffee	1 kg	\$15.00	\$0.15
 Biscuits	Tin	\$3.00	\$0.05
 Beer	Can	\$1.00	\$0.01

Ejemplos del bajo coste del transporte marítimo

UNCTAD suggests that the ratio of the various freight costs to import values continues to decline, and that total freight costs in world trade still represent, on average, less than 6% of the import value (or shelf price) of consumer goods.

Shipping costs and product values
(Values and freight rates in USD 2004)

Products	Items/FEU ⁽¹⁾		Retail value ⁽²⁾		Freight/Value ⁽³⁾		Observations
	Units		USD		%		
	Low	High	Low	High	Low	High	
Low-value clothing	90 000	130 000	225 000	520 000	0.56	1.91	Packed for sale by consignor or at destination. High rate of offshoring; high margins.
Medium-range clothing	25 000	60 000	500 000	3 600 000	0.08	0.86	
Sports shoes	18 000	78 000	350 000	2 520 000	0.12	0.23	
Bicycles	1 200	1 600	240 000	480 000	0.60	1.79	Assembled on arrival at destination.
Toys, low quality	20 000	60 000	60 000	720 000	0.40	7.17	In bulk or packaged.
Consumer electronics, TV, hi-fi small items	2 800	3 600	170 000	430 000	0.67	2.53	Correlation between offshoring/number of units. Assembled on arrival at destination.
- large items (TVs)	240	480	70 000	140 000	2.07	6.14	
Small household appliances	600	1 200	45 000	100 000	2.90	9.56	Low rate of offshoring. Optimisation of volumes/containers
Large household appliances (white goods)	100	130	30 000	65 000	4.16	14.33	
Furniture assembled	250	600	20 000	150 000	1.93	21.50	Increased offshoring of flat-packed furniture
- flat pack	1 000	3 000	70 000	360 000	0.80	6.14	
Automobile spare parts	600	15 000	50 000	375 000	0.77	8.60	Excluding electronics

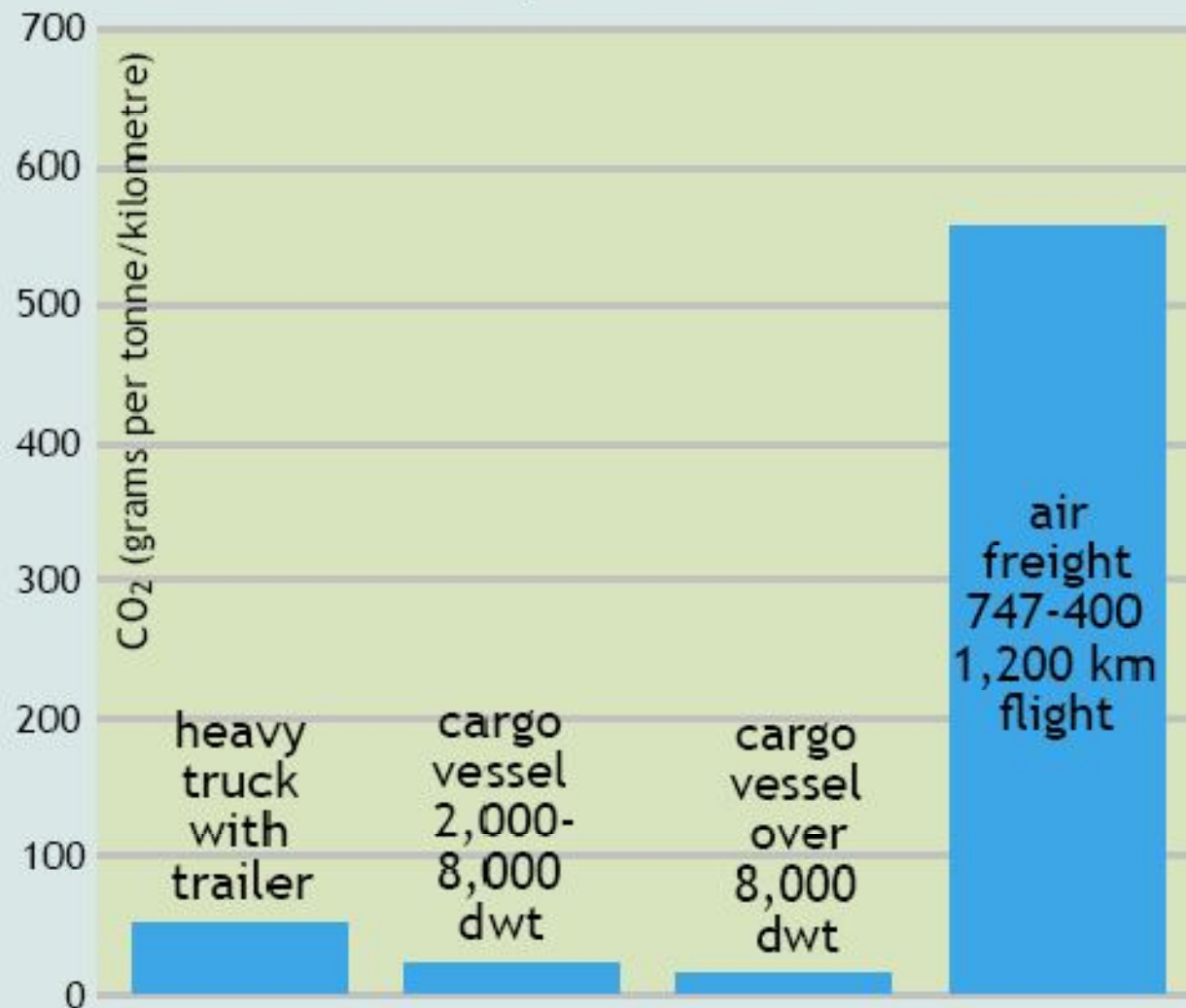
(1) Average number of items or units per 40' container (standard and high cube = Forty-foot Equivalent Unit).

(2) Evaluation of retail prices in major outlets or chains (= low 2004 averages).

(3) Freight base rate/FEU (Asia/US and Asia/Europe) Principal source CI + cross-correlation of interviews with operators and shipping agents/professional press.

Fuente: UNCTAD

Comparison of CO₂ emissions between different transport modes



Source: NTM (Swedish Network for Transport and the Environment)

Y puede competir casi en tiempo con la carretera en distancias medias

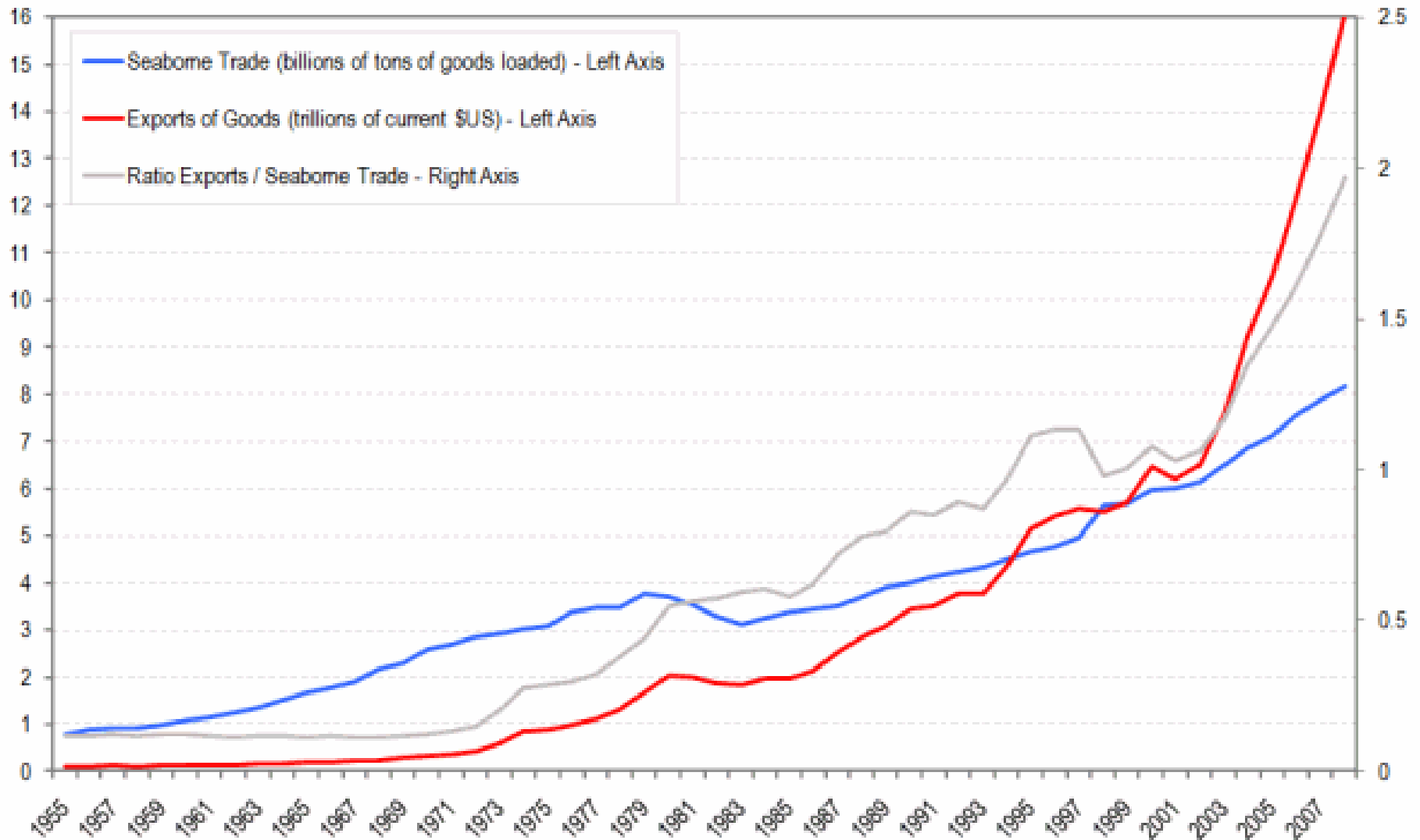
Comparative sequence of lead times for manufacturing new vehicles			
Days/process	Long-distance maritime transport	Short-sea shipping	Road
	Asia - Europe	Intra-Europe	Intra-Europe
- Placement of order	1 - 2	1 - 2	1 - 2
- Manufacture	8	6 - 8	6 - 8
- Packaging/shipment	3	1 - 2	1 - 2
- Transit time in port	7	1 - 2	} 2
- Shipping	12 - 25	2	
- Unloading/Customs	3 - 5	1	} 2
- Delivery	1 - 2	1 - 2	
TOTAL number of days	35 - 54	13 - 19	12 - 16

Exige mayor coordinación y eficiencia logística: los sobrecostos aparecen más por problemas de tiempo que de flete

Sourcing of textiles and clothing Surcharges arising from transit times and freight transport

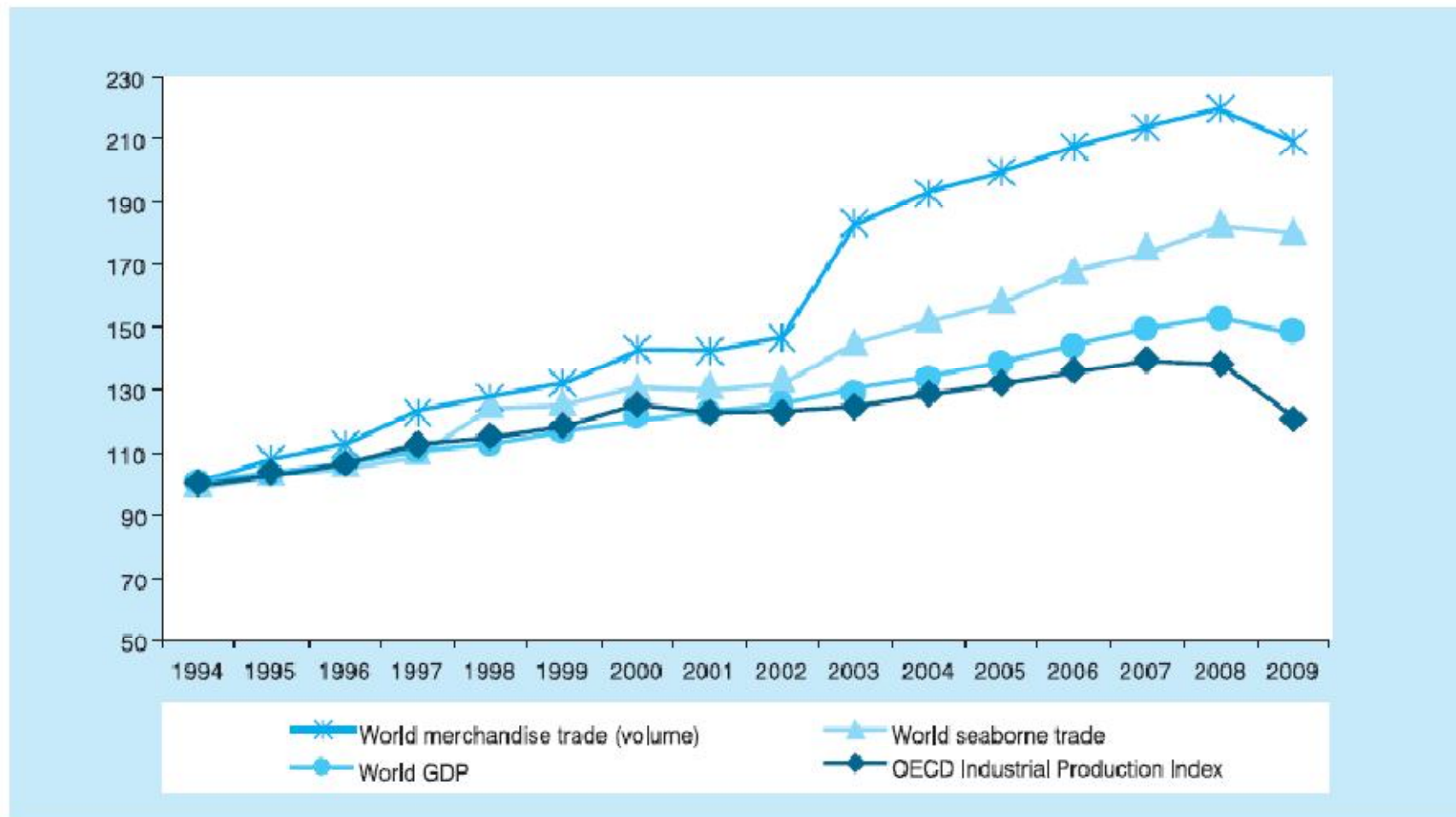
% of surcharges	Time factor	Freight factor	Total
Mexico	1.0%	0.6%	1.6%
Dominican Republic	2.5%	1.7%	4.2%
China	6.0%	5.8%	11.8%
Hong Kong	6.0%	3.1%	9.1%
South Africa	12.5%	5.0%	17.5%

Source: OECD 2002.



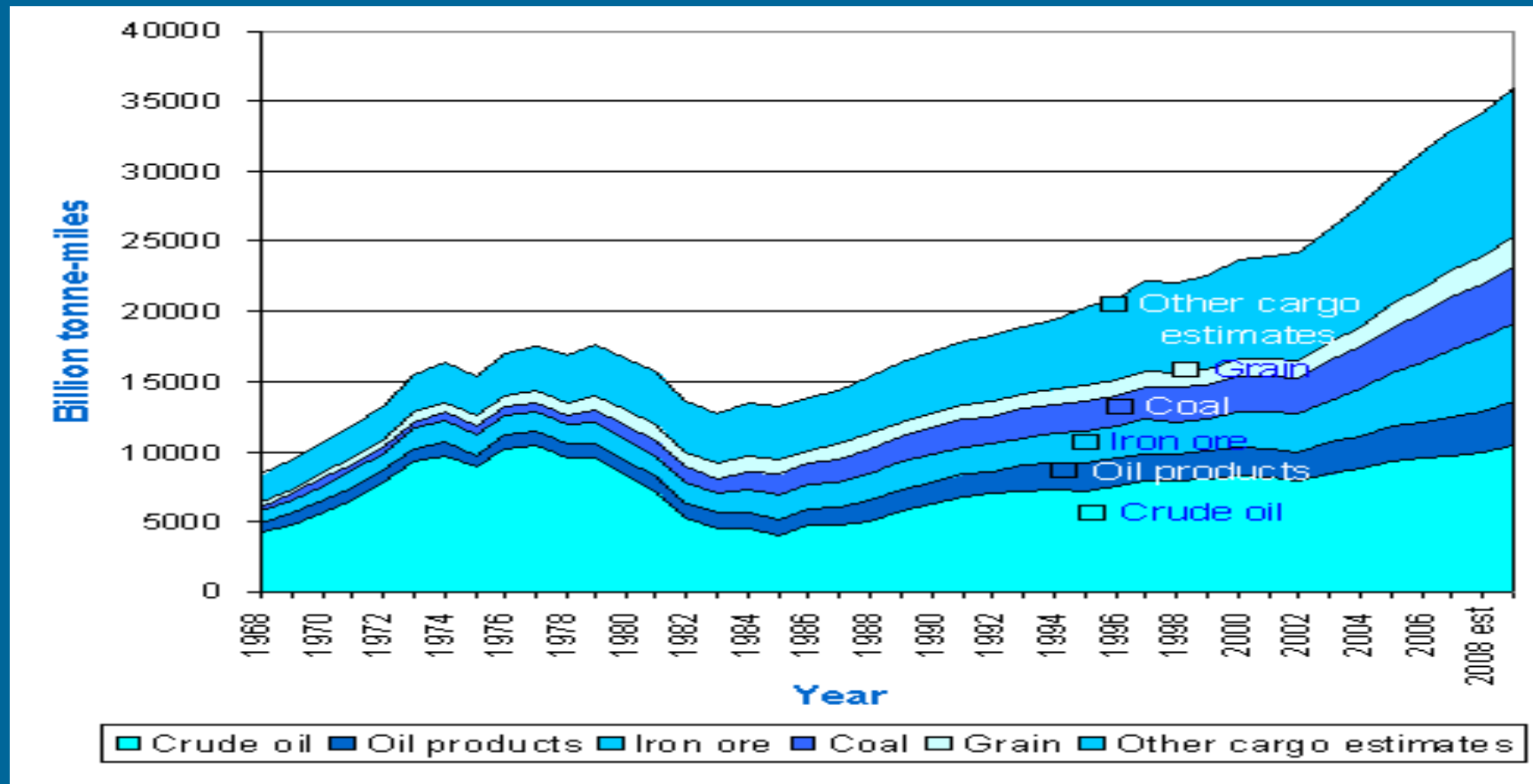
Source: WTO. United Nations, Review of Maritime Transport.

**Indices for world economic growth (GDP), OECD Industrial Production Index
and world seaborne trade (volume), 1994–2009**
(1994 = 100)



Source: UNCTAD secretariat on the basis of OECD Main Economic Indicators, June 2009; UNCTAD *Trade and Development Report 2009* and UNCTAD *Review of Maritime Transport*, various issues. The 2009 data for seaborne trade was derived by applying the growth rate forecasted by Fearnleys and Clarkson Research Services. The 2009 data for the volume of world merchandise trade was derived by applying the growth rate forecasted by WTO. Trade volumes data are derived from customs values deflated by standard unit values and adjusted price index for electronic goods.

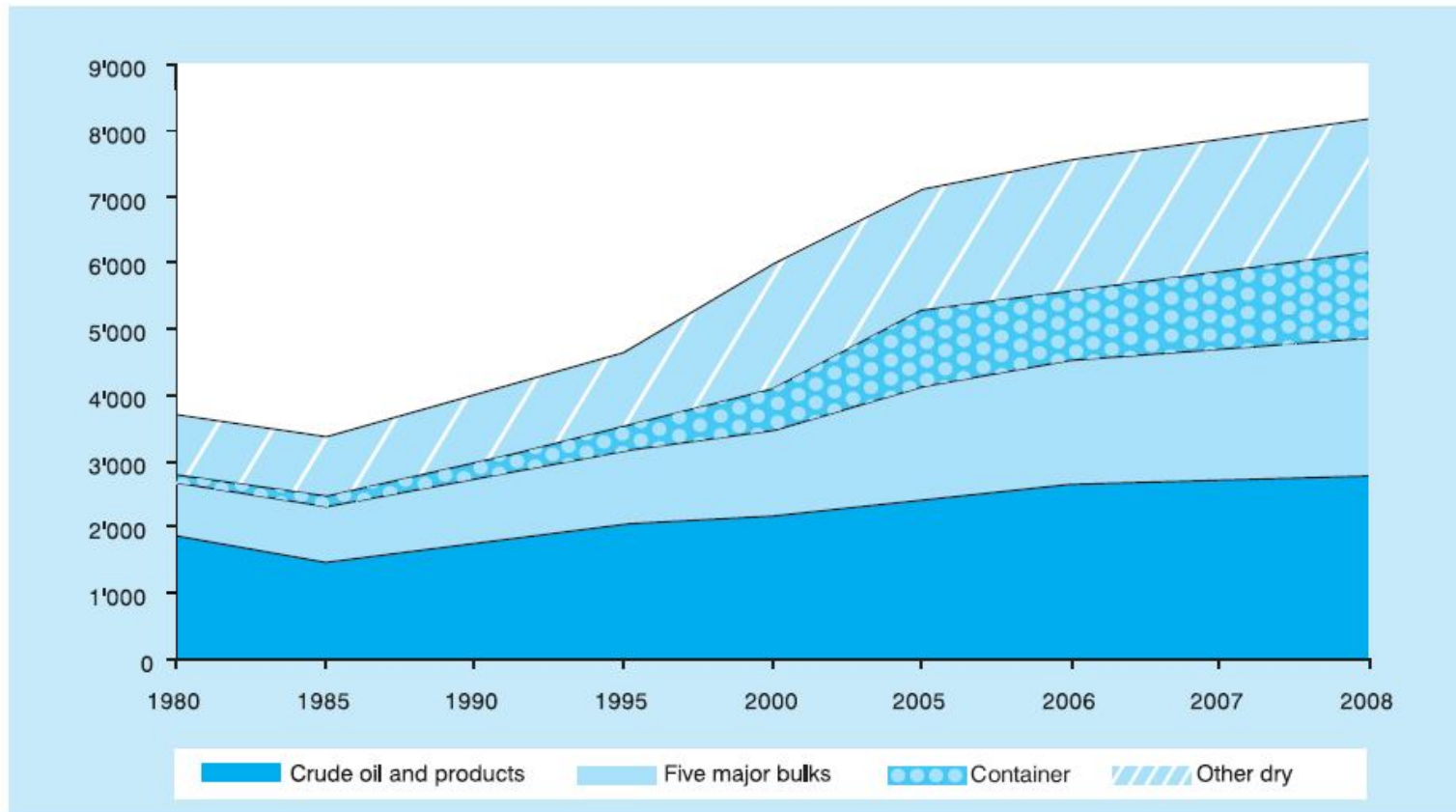
World seaborne trade 1969-2009



Source: Fearnley's Review

International seaborne trade, selected years

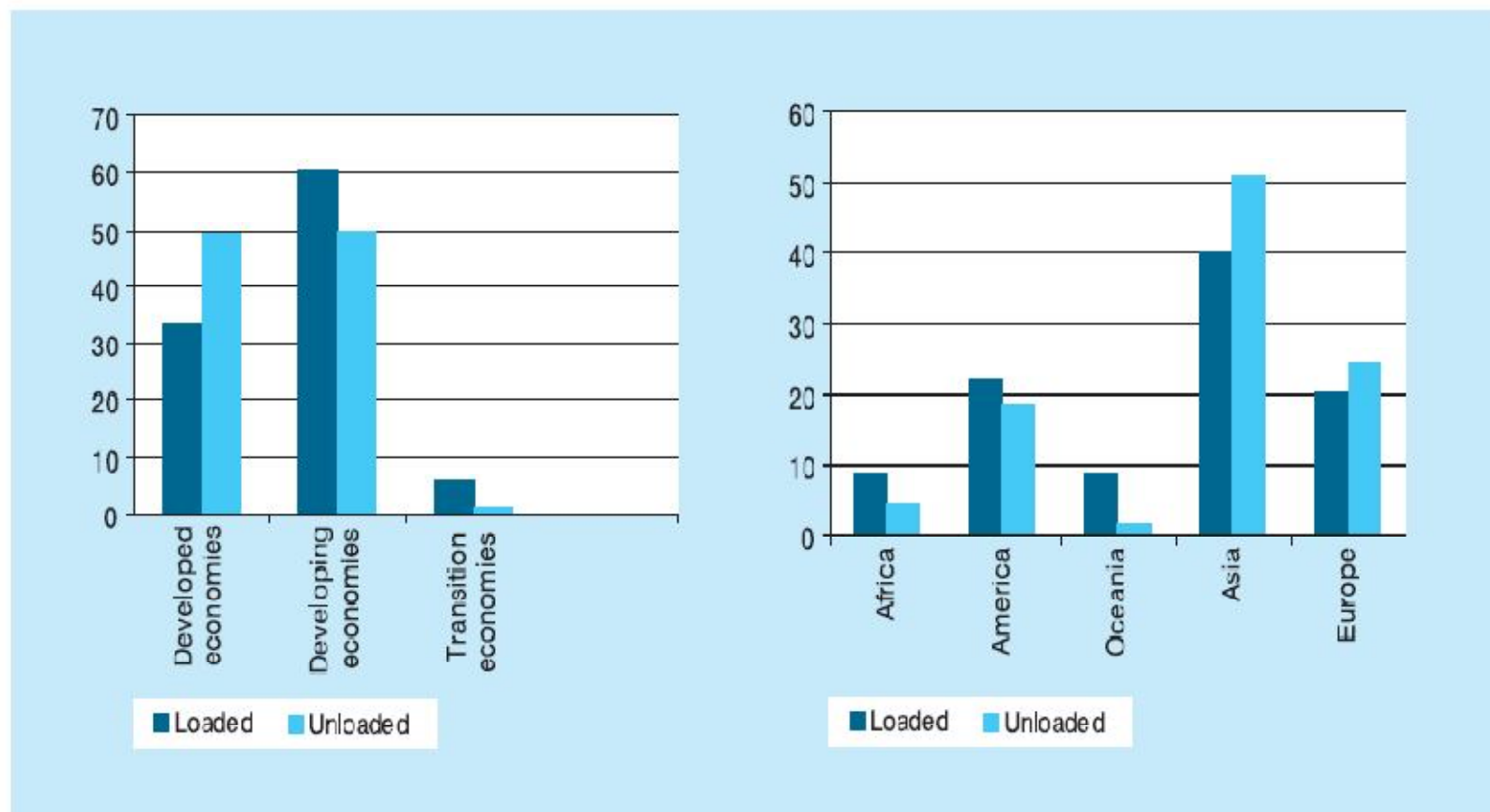
(millions of tons loaded)



Source: *Review of Maritime Transport*, various issues. Data for container trade based on Clarkson Research Services, Shipping Review Database, Spring 2009.

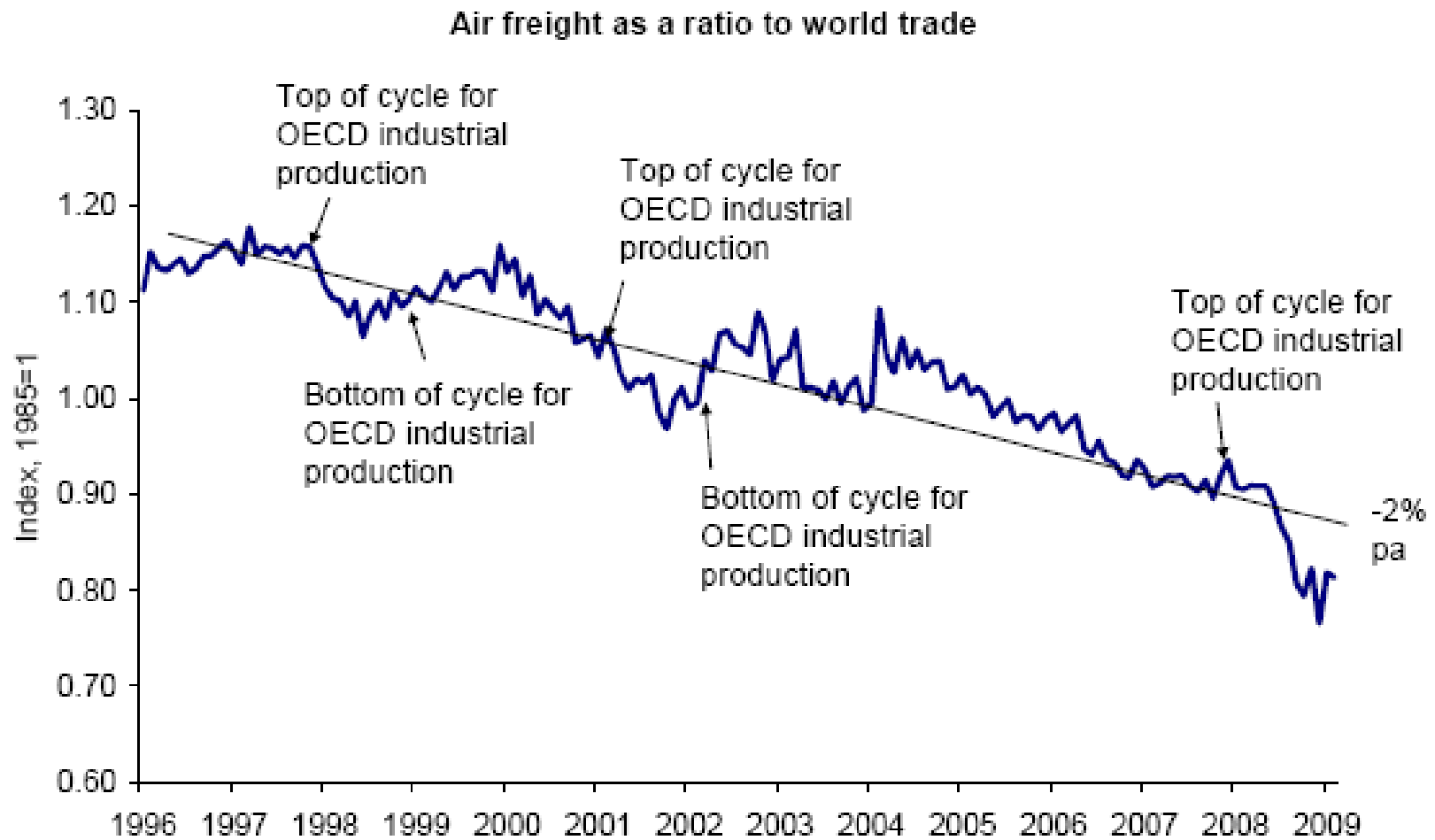
World seaborne trade, by country group and region, 2008

(percentage share in tonnage)



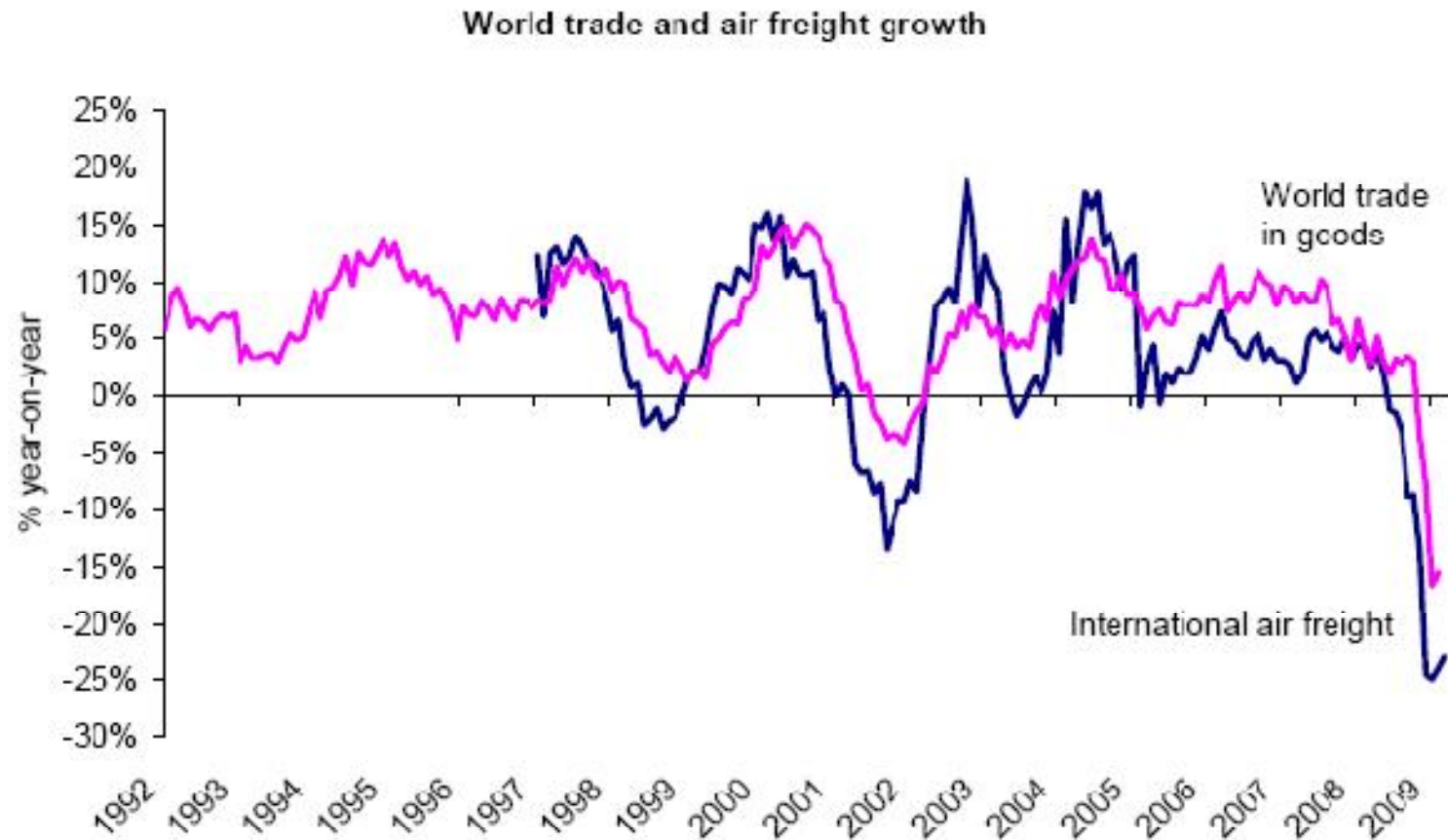
Source: Compiled by the UNCTAD secretariat, on the basis of data supplied by reporting countries, ports and specialized sources.

..contrasta con la tendencia decreciente del aéreo...



Source: IATA

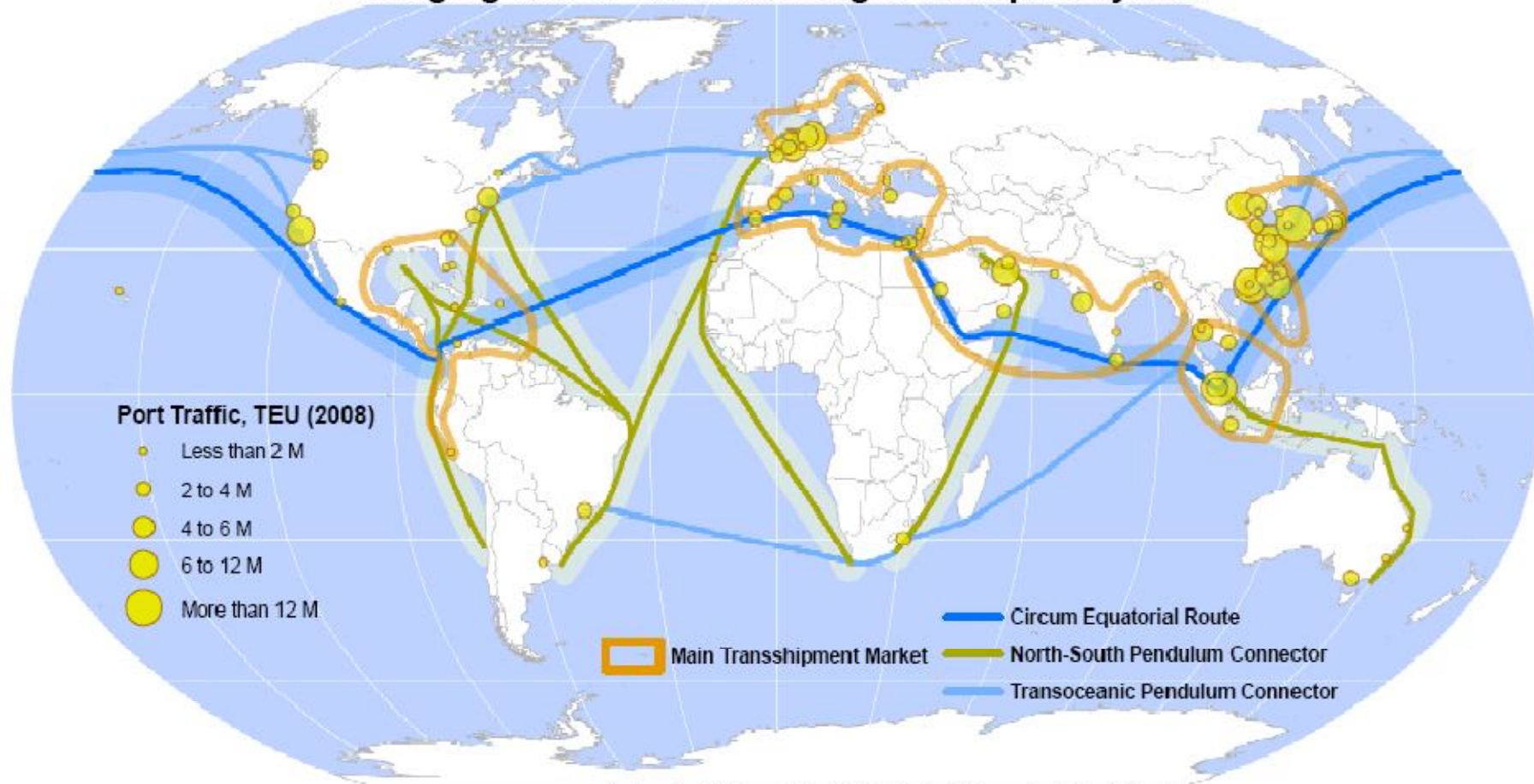
..cuyas variaciones son además mayores que las de la economía



Source: IATA, Netherlands Bureau for Economic Policy Analysis (CPB)

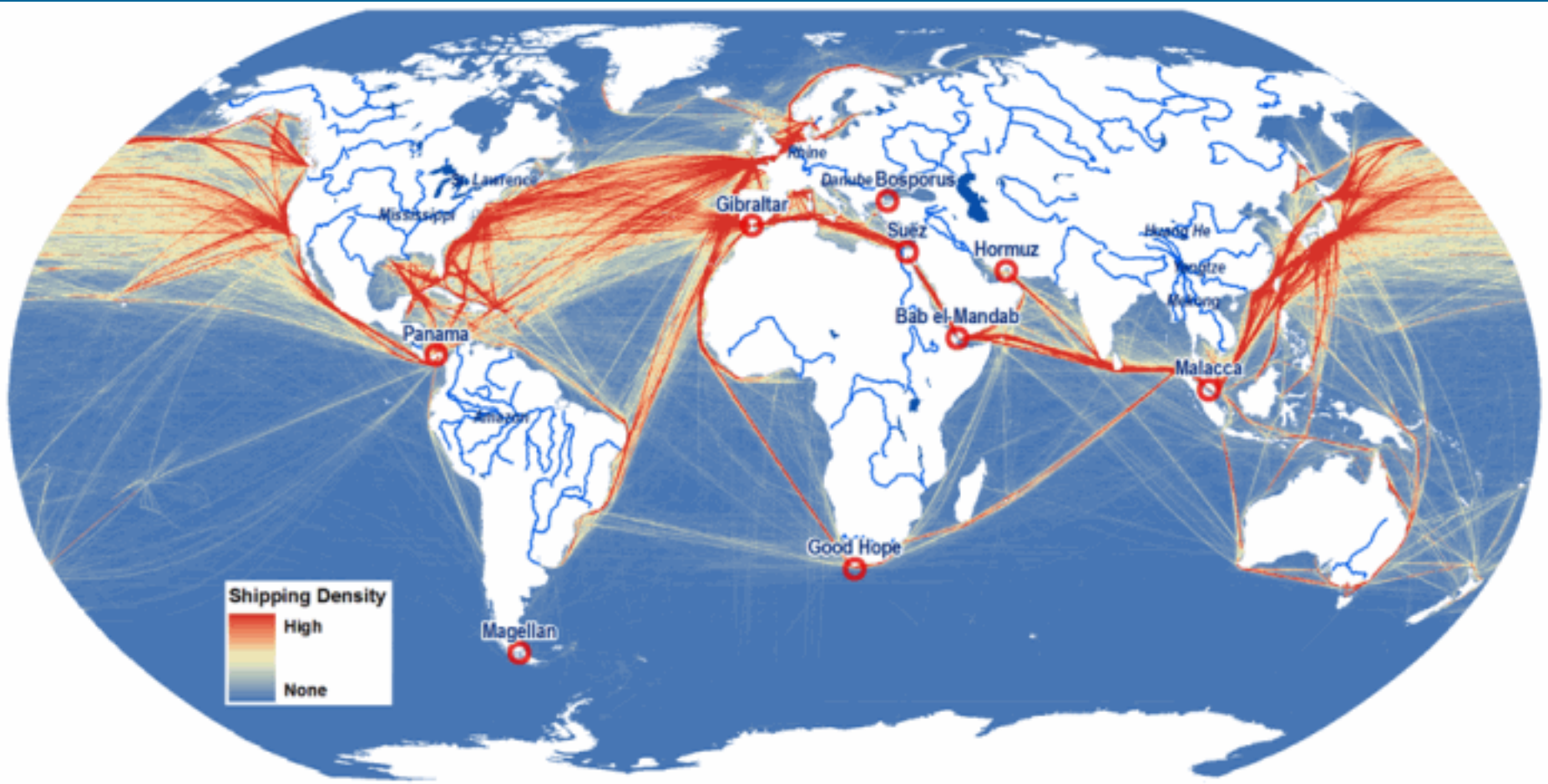
Las rutas del transporte siguen las corrientes comerciales

Emerging Global Maritime Freight Transport System



Dr. Jean-Paul Rodrigue, Dept. of Global Studies & Geography, Hofstra University.

Intensidad Tráfico marítimo



Source: Shipping density data adapted from National Center for Ecological Analysis and Synthesis, A Global Map of Human Impacts to Marine Ecosystems.

AMAX Round-the-World Route



Rotation: 62 day

Lianyungang ► 5 days ► Port Kelang ► 12 days ► Damietta ► 9 days ► Valencia ► 8 days ► New York ► 17 days ► Los Angeles ► 11 days ► Lianyungang

- The first round-the-world routes were introduced in 1984 by the Taiwanese maritime shipping company **Evergreen**. This route took about 69 days and was serviced by about 10 4,000 TEUs ships in each direction (Westbound and Eastbound)
- In 2005, a new round-the-world service was introduced by **China Shipping Line** (AMAX) that includes a rotation of ten 4,250 TEU containerships (the maximum size that can go through the Panama Canal) completed in about 62 days



La estrella del transporte marítimo internacional

World Shipping Council

Number of ships (by total and trade)

As of 1st July 2009, the world fleet was made up of 53,005 ships.

Different sectors as percentage of total number of ships in world fleet:

Figures in brackets are numbers of ships, by sector.

Source: Lloyd's Register Fairplay July 2009

General Cargo ships (17,104)

Bulk Carriers (7,787)

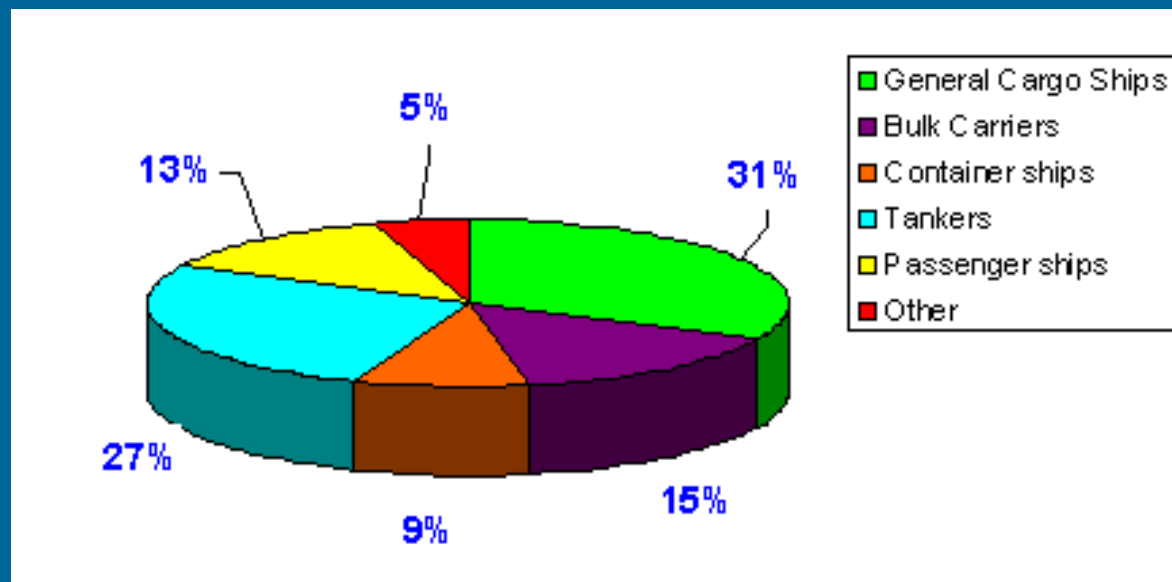
Container ships (4,678)

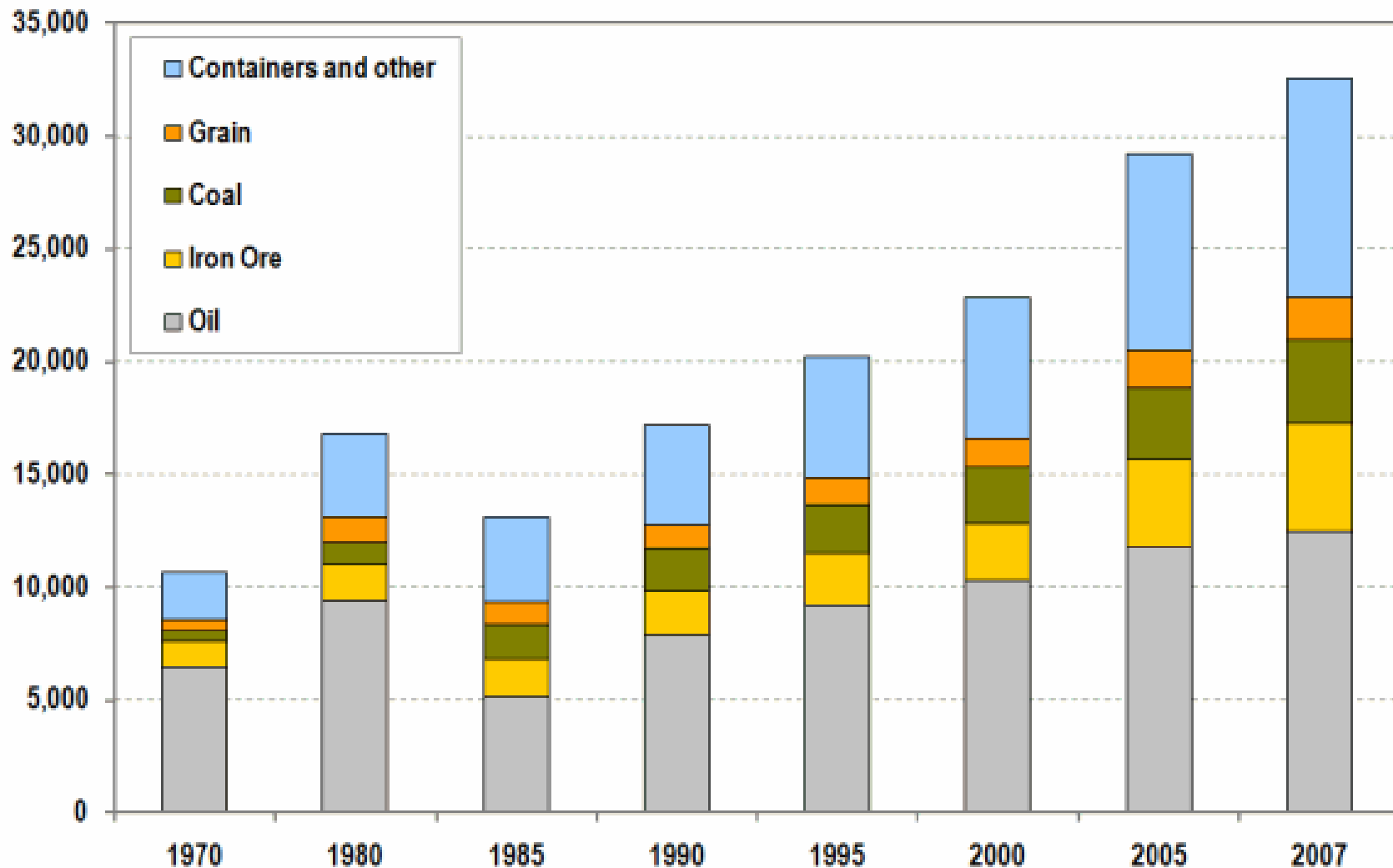
Tankers (14,095)

Passenger ships (6,839)

Other (2,502)

TOTAL (53,005)





Ton-Miles Shipped by Maritime Transportation, 1970-2007 (in billions)

The 20 leading service operators of container ships at the beginning of 2009

(number of ships and total shipboard capacity deployed (TEUs))

Ranking	Operator	Country/territory	Number of ships in 2009	TEU capacity in 2009
1	Maersk Line	Denmark	426	1 740 936
2	MSC	Switzerland	431	1 510 720
3	CMA-CGM Group	France	280	864 893
4	Evergreen	Taiwan Province of China	181	629 615
5	Hapag-Lloyd	Germany	132	496 724
6	COSCON	China	141	491 580
7	APL	Singapore	128	470 901
8	CSCL	China	121	431 582
9	MOL	Japan	109	387 107
10	Hanjin	Republic of Korea	83	365 605
Subtotal			2 032	7 389 663
11	OOCL	Hong Kong (China)	90	364 384
12	NYK	Japan	82	358 094
13	Yang Ming	Taiwan Province of China	85	317 473
14	K Line	Japan	99	309 496
15	HMM	Republic of Korea	58	258 648
16	Hamburg Sud	Germany	81	256 513
17	Zim	Israel	82	251 717
18	UASC	Kuwait	43	155 462
19	PIL	Singapore	76	147 985
20	CSAV	Chile	56	141 957
Total 1–20			2 784	9 951 392
World container cellular fleet at 1 January 2009			9 447	14 429 080

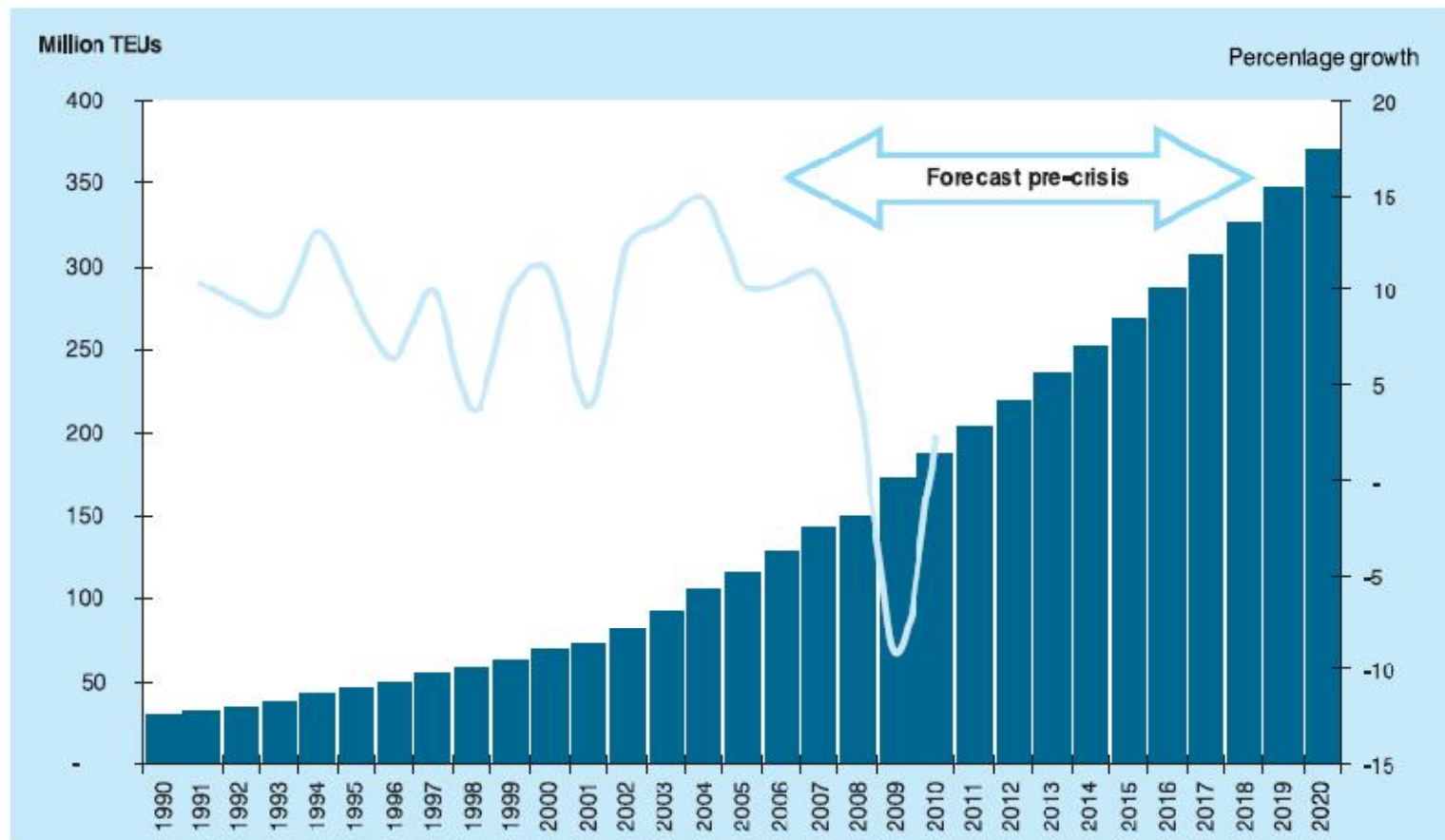
Source: UNCTAD secretariat, based on *Containerisation International Online*, Fleet Statistics. Available at <http://www.ci-online.co.uk>.

Top ten container operators

Rnk	Operator	Teu	Share	Existing fleet	Orderbook book
1	APM-Maersk	2,038,983	15.0%		
2	Mediterranean Shg Co	1,505,646	11.1%		
3	CMA CGM Group	1,021,036	7.5%		
4	Evergreen Line	591,286	4.4%		
5	APL	549,643	4.1%		
6	Hapag-Lloyd	472,833	3.5%		
7	COSCO Container L.	469,491	3.5%		
8	CSCL	463,121	3.4%		
9	NYK	410,085	3.0%		
10	Hanjin Shipping	409,363	3.0%		

Source: AXS-Alphaliner TOP 100 2009

Global container trade, 1990–2020
(TEUs and percentage change)

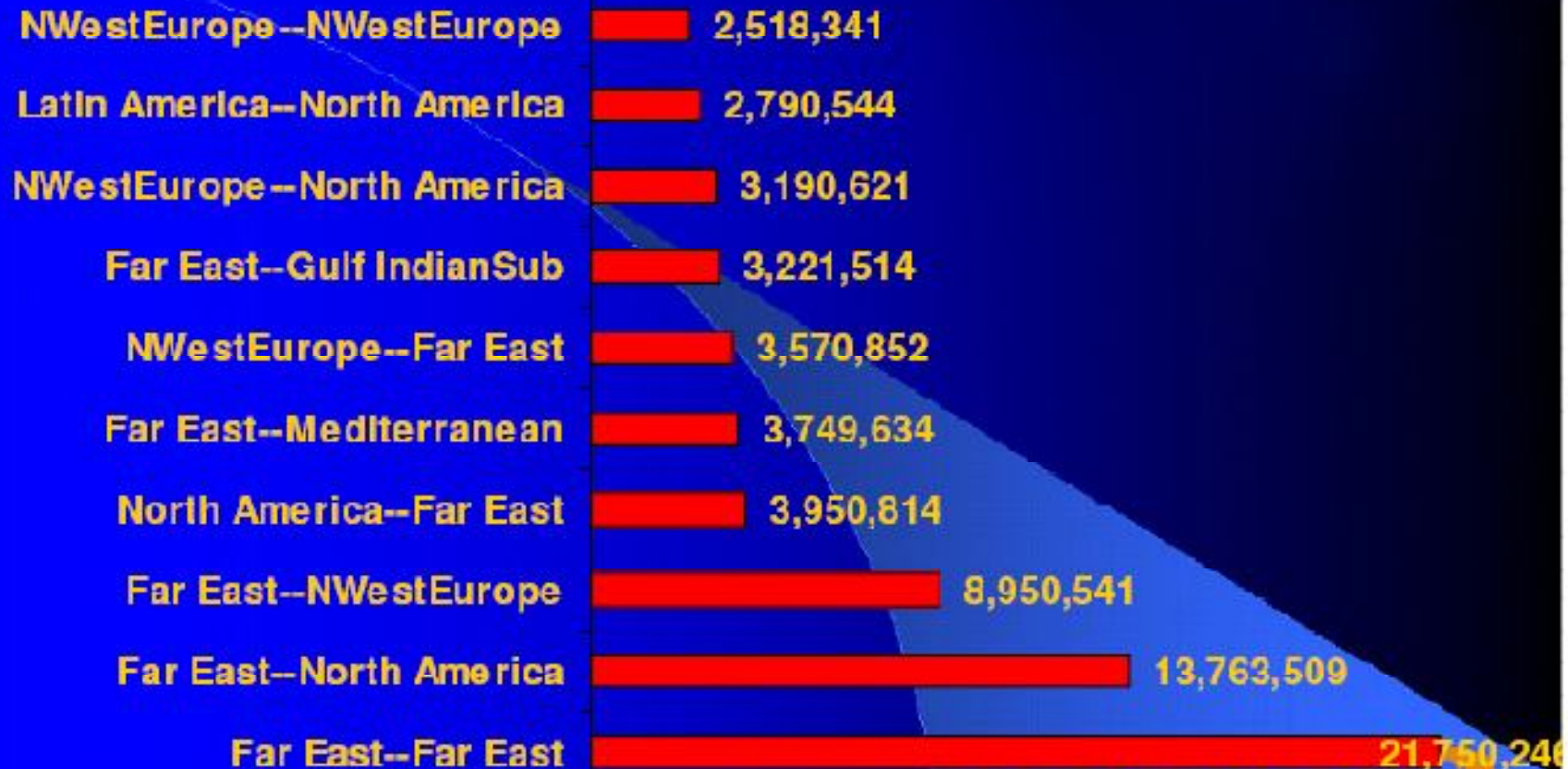


Source: Drewry Shipping Consultants, *Container Market Review and Forecast 2006/2007* and *2008/2009*, and Clarkson Research Services Limited, *Container Intelligence Monthly*, September 2009.

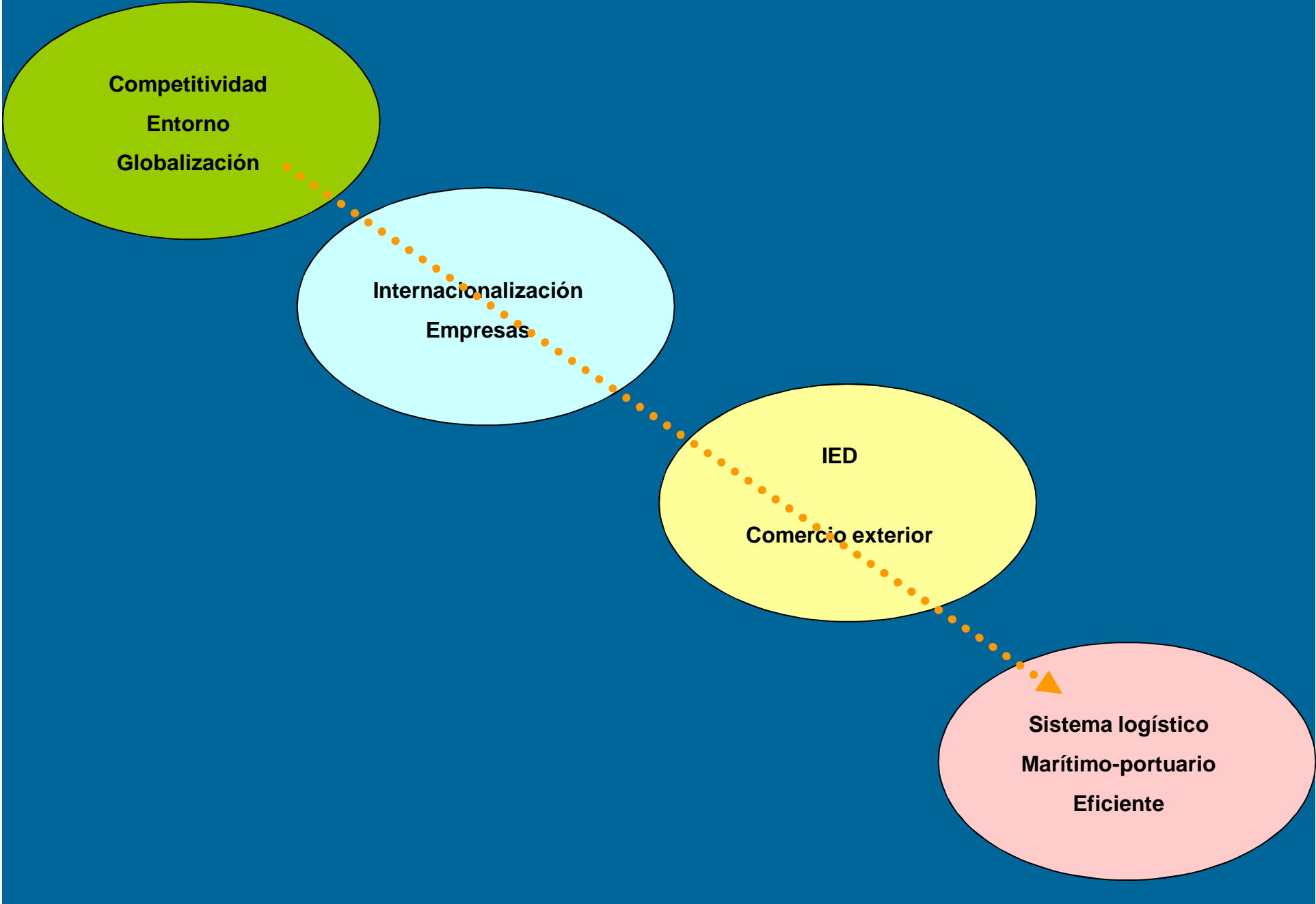
Notes: Forecasts of container trade volumes for 2009–2020 were made in 2005/2007 and precede the global financial and economic crisis of late 2008. Annual percentages changes for 2008–2010 are obtained from *Container Intelligence Monthly*, September 2009.

Top 10 Container Routes – TEU

Far East Traffic = 62% of Total



LLOYD'S MIU



Normas, leyes
Procedimientos
Organización administrativa
Mecanismos toma decisiones
Dotación presupuestaria

Marco institucional

Crea incentivos Inversión
Define competencia mercados
Afecta eficiencia

Determina liderazgos
Permite mecanismos coordinación

Infraestructura:

Marítima
Terrestre
Telemática

Superestructura:

Equipos
Recursos humanos
Instalaciones
Espacios

Competitividad
SL (P)

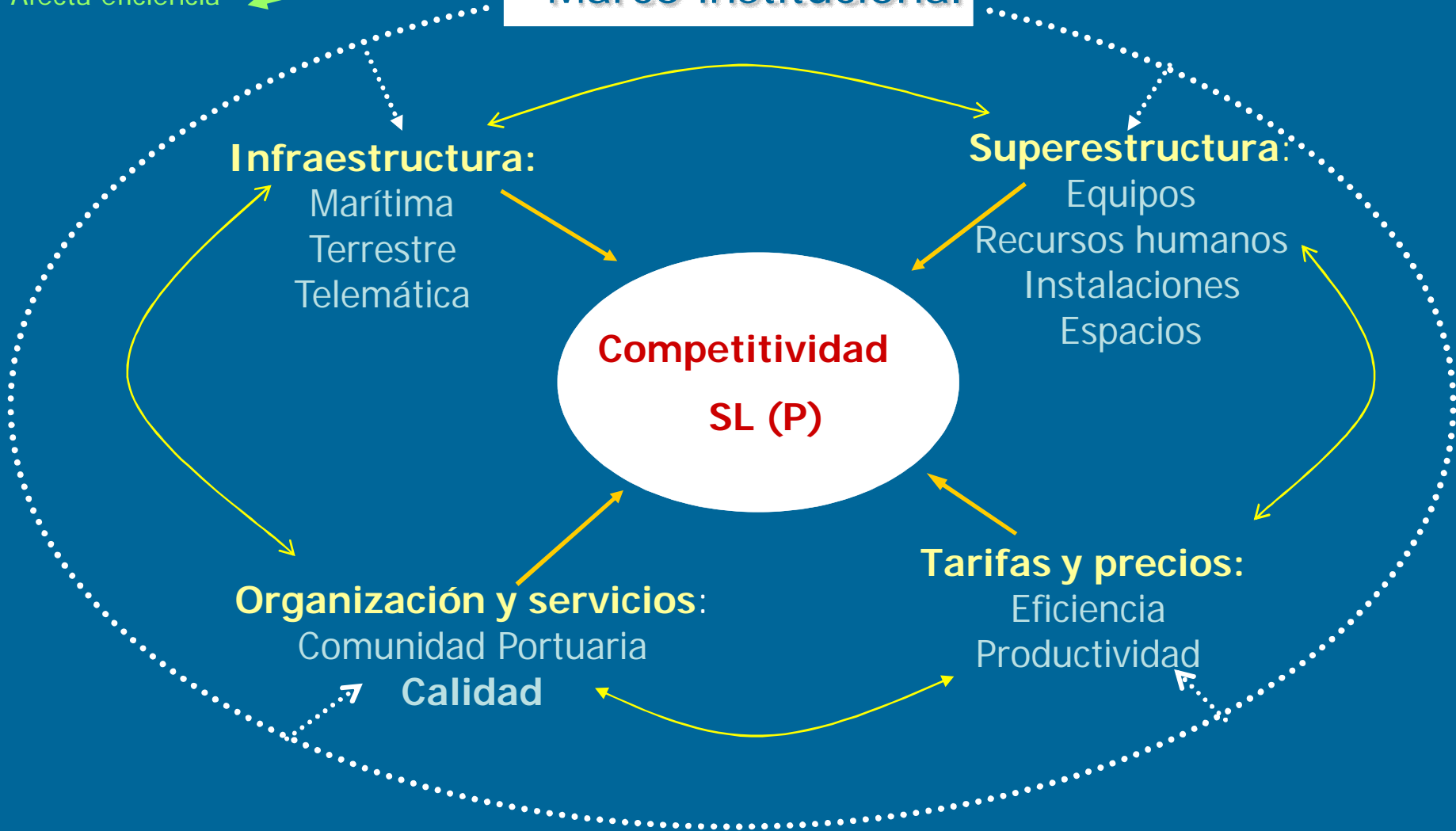
Organización y servicios:

Comunidad Portuaria

Calidad

Tarifas y precios:

Eficiencia
Productividad



Fuentes

Why has world trade grown faster than world output?

By Mark Dean of the Bank's International Economic Analysis Division and Maria Sebastia-Barriel of the Bank's Structural Economic Analysis Division.

**Progreso y alcance de la
globalización financiera**

Un análisis empírico del periodo 1986-2004

*Pablo Bustelo Gómez**

REVIEW OF MARITIME TRANSPORT

2009

Report by the UNCTAD secretariat

UNITED NATIONS CONFERENCE ON TRADE AND DEVELOPMENT

**WORLD
INVESTMENT
REPORT**

informe sobre el desarrollo mundial **2009**

*Una nueva geografía
económica*

Panorama general

Lloyd's Marine Intelligence Unit

Measuring Global Seaborne Trade

International Maritime Statistics Forum
New Orleans
4-6 May 2009

THE ROLE OF CHANGING TRANSPORT COSTS AND TECHNOLOGY
IN INDUSTRIAL RELOCATION

IATA ECONOMIC BRIEFING

APRIL 2009

AIR FREIGHT TIMELY INDICATOR OF ECONOMIC TURNING POINT

**Industrial Tariff Liberalization
and the Doha Development Agenda**