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infrastructure and air transport logistics

future challenges

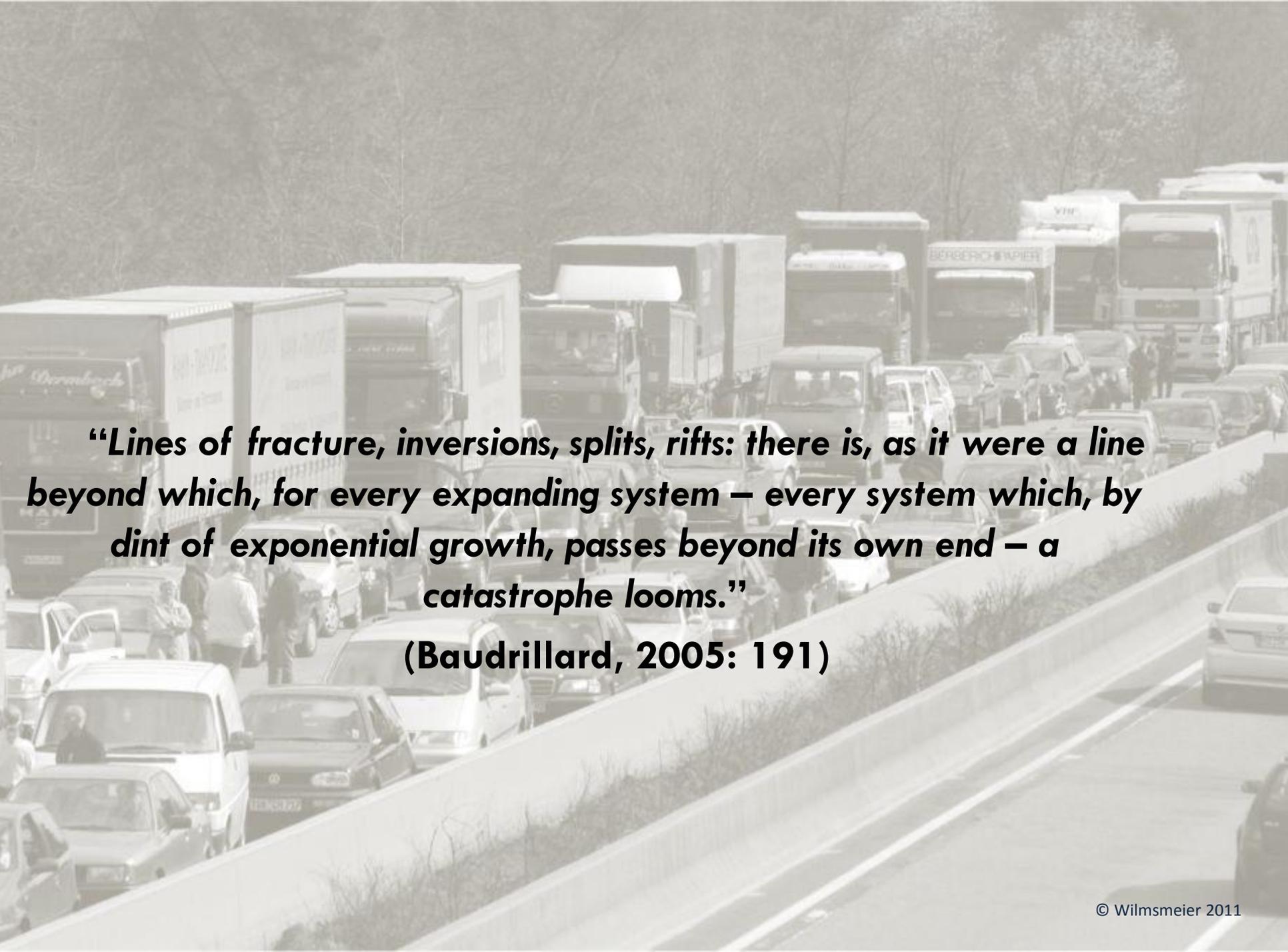


Seminario sobre “Transporte y Política Aérea”

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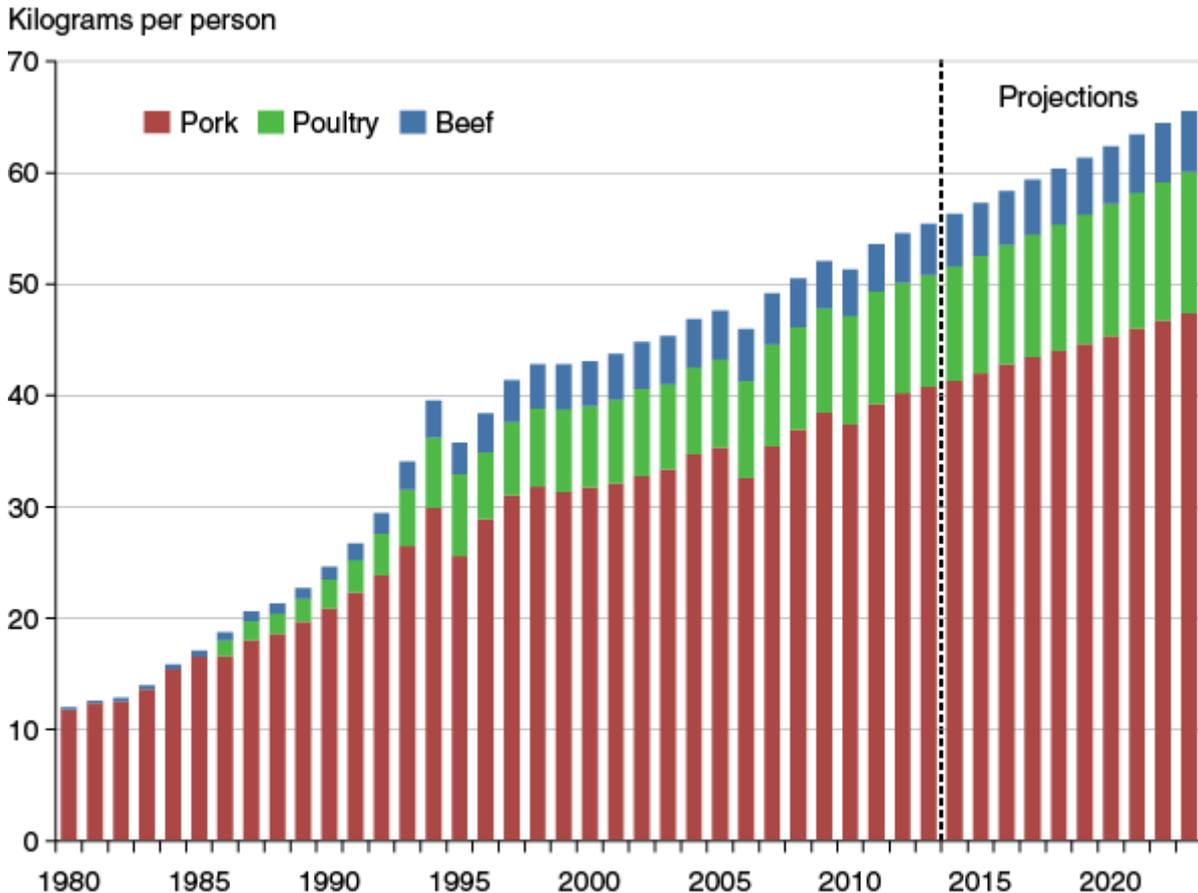


“Lines of fracture, inversions, splits, rifts: there is, as it were a line beyond which, for every expanding system – every system which, by dint of exponential growth, passes beyond its own end – a catastrophe looms.”

(Baudrillard, 2005: 191)



how is China's meat consumption related to the future challenges in the air transport sector?

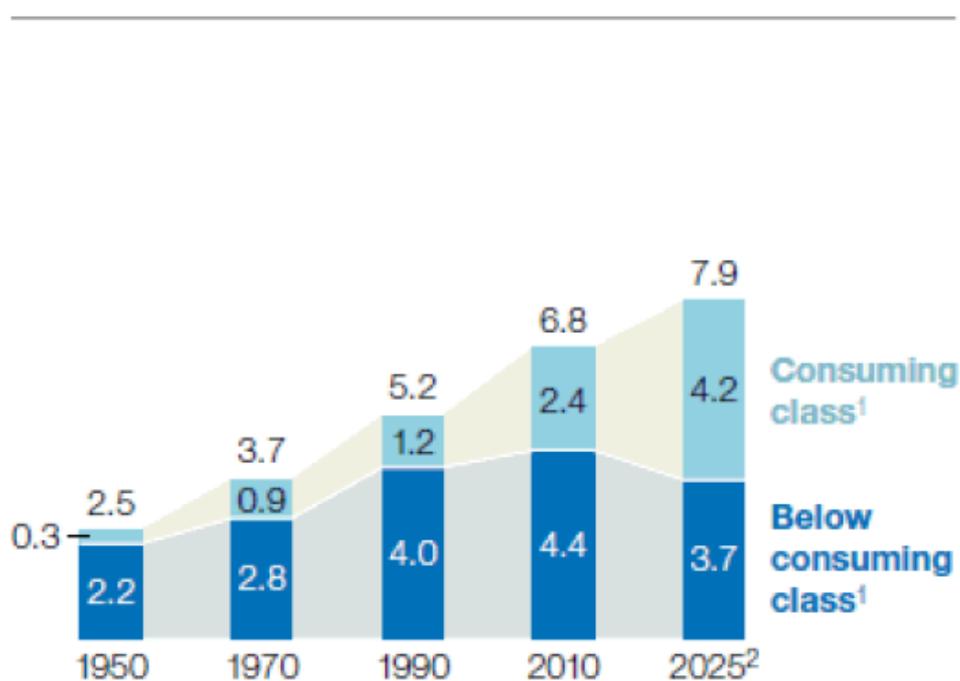


Source: USDA Production, Supply and Distribution database and projections.



(new) challenges ?

World population, billions



World consumption, \$ trillion



¹Consuming class: daily disposable income is ≥\$10; below consuming class, <\$10; incomes adjusted for purchasing-power parity.

²Projected.

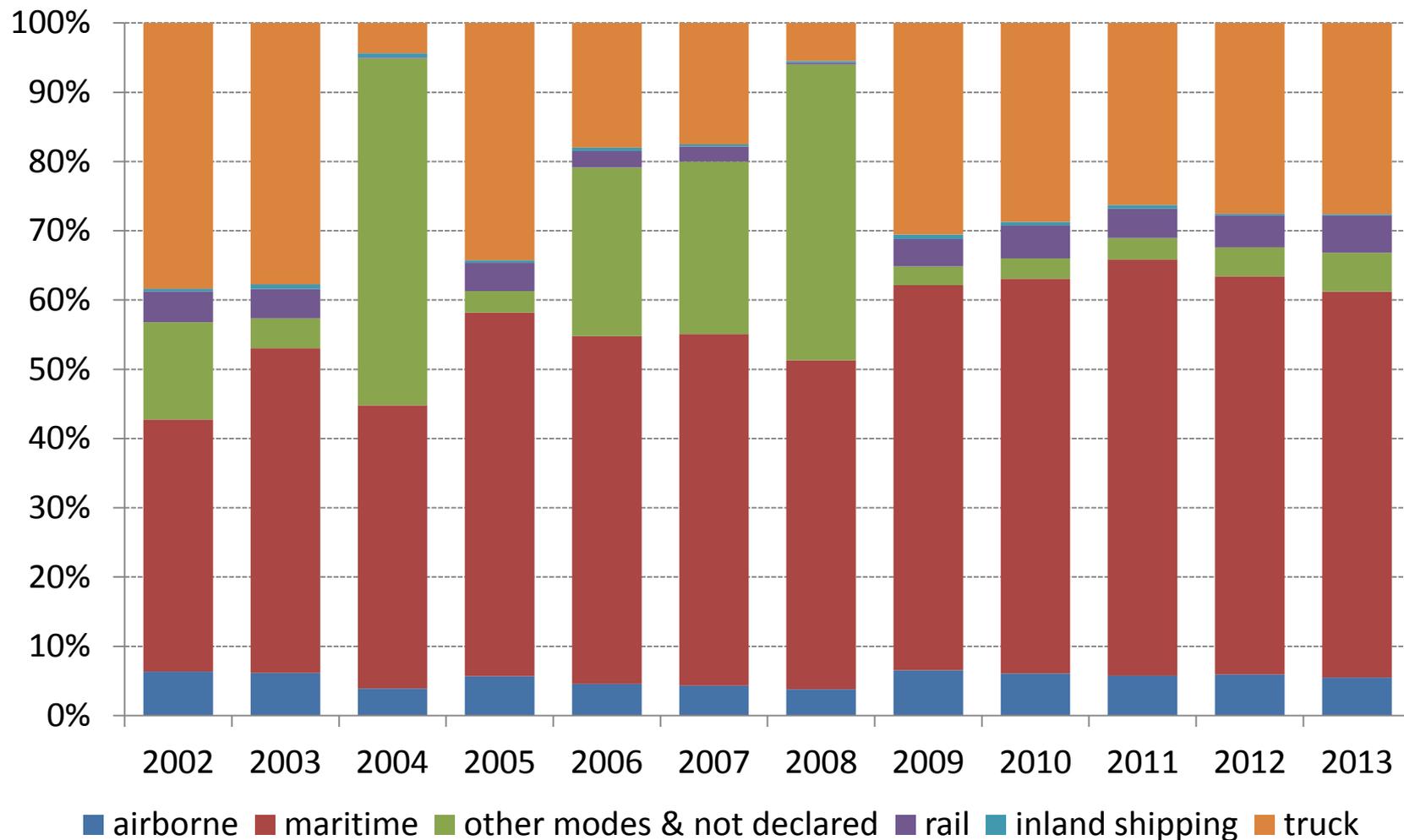
³Estimate based on 2010 private-consumption share of GDP per country and GDP estimates for 2010 and 2025; assumes private consumption's share of GDP will remain constant.

Source: Angus Maddison, founder of Groningen Growth and Development Centre, University of Groningen; Homi Kharas, senior fellow at Wolfensohn Center for Development at Brookings Institution; McKinsey Global Institute analysis



SA modal split international transport, exports 2002-2013

(value current USD)

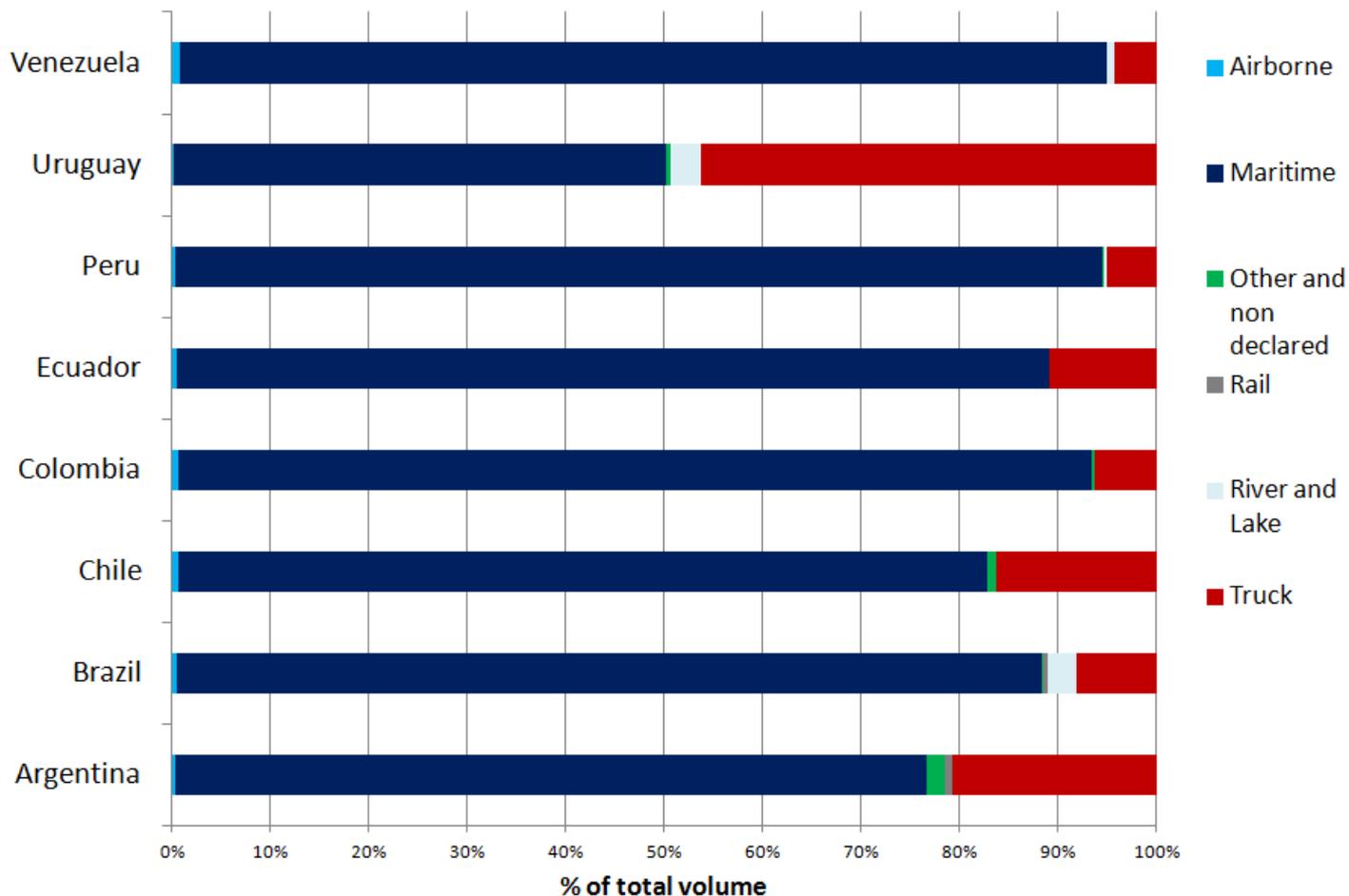




modal split in international transport 2012

selected countries

(volume – metric tons)

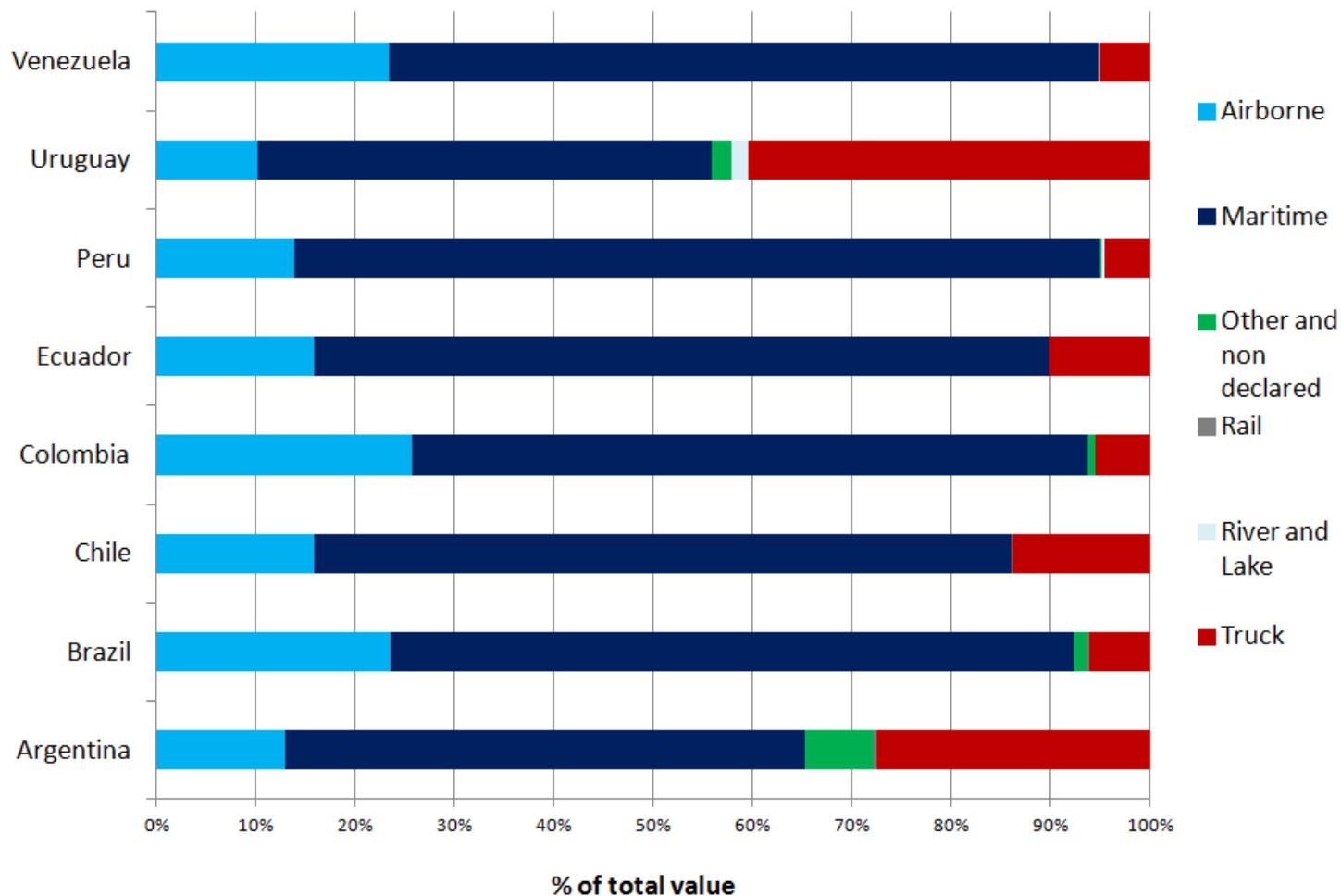




modal split in international transport 2012

selected countries

(value current USD)



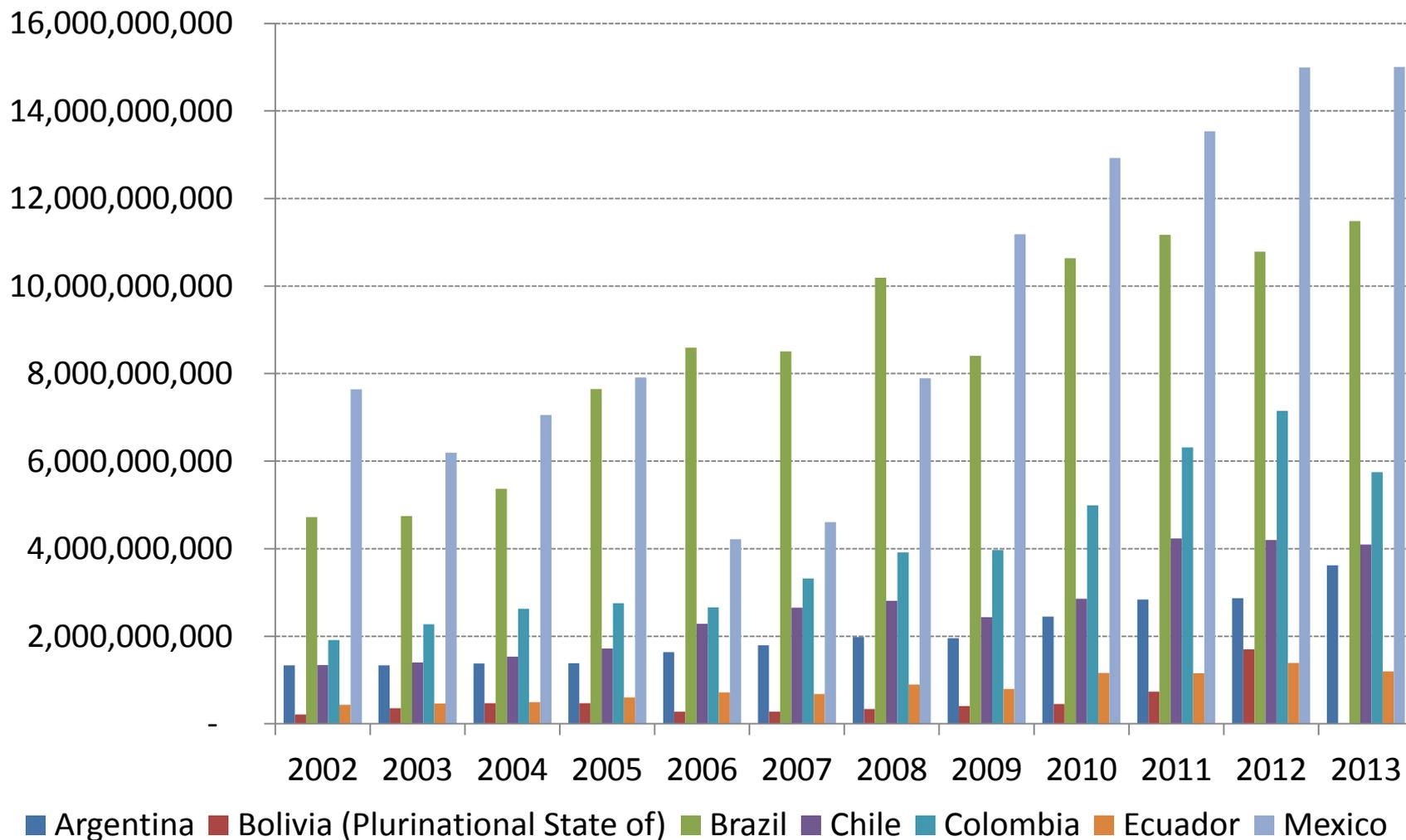
Note: SITC 3 and SITC 9 products are excluded in this presentation.

Source: Author, based on International Transport Database (BTI), UN-ECLAC, year 2012



evolution of airborne exports 2002-2013

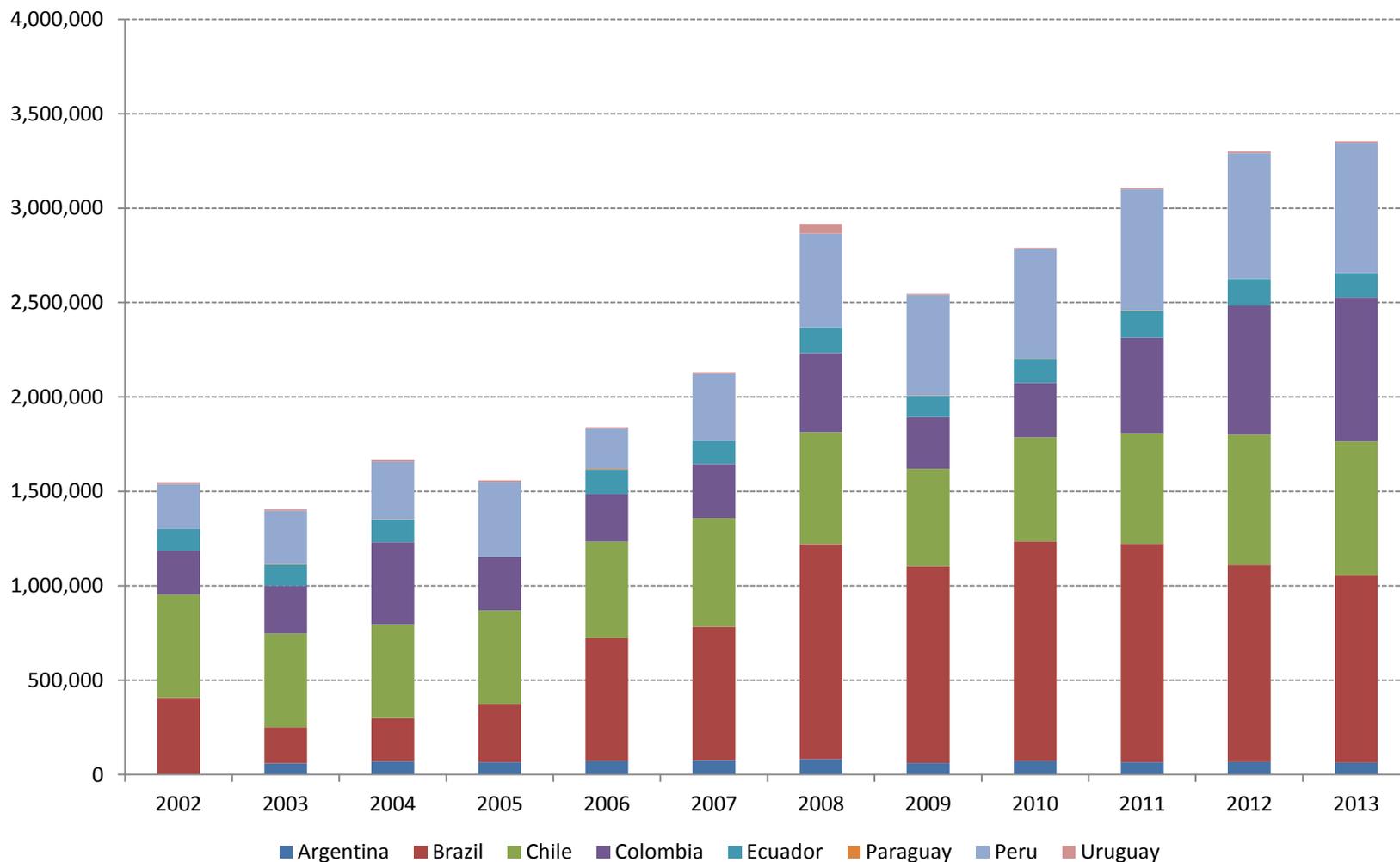
(value current USD)





evolution of airborne exports 2002-2013

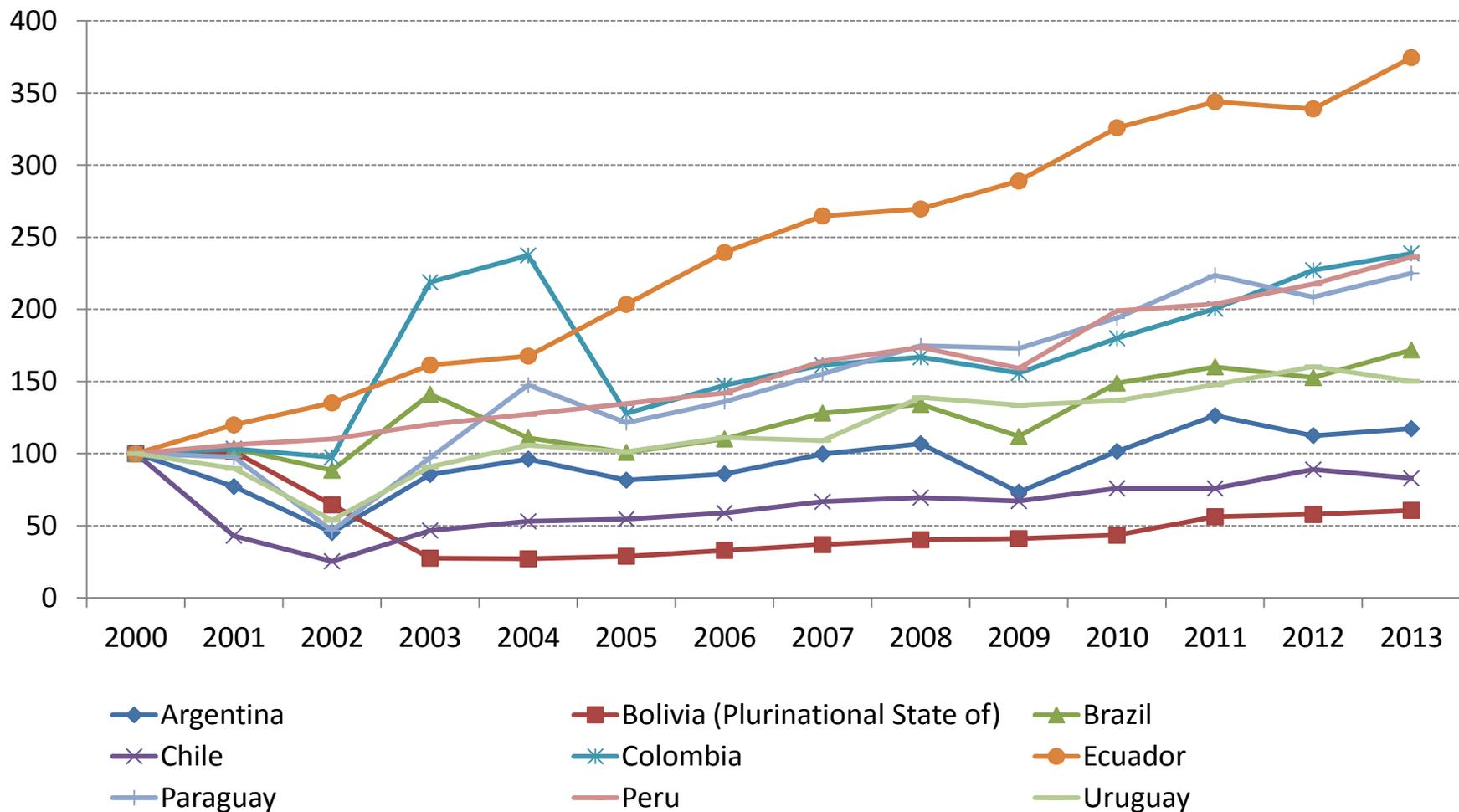
(volume metric tonnes)





evolution of airborne exports 2002-2013

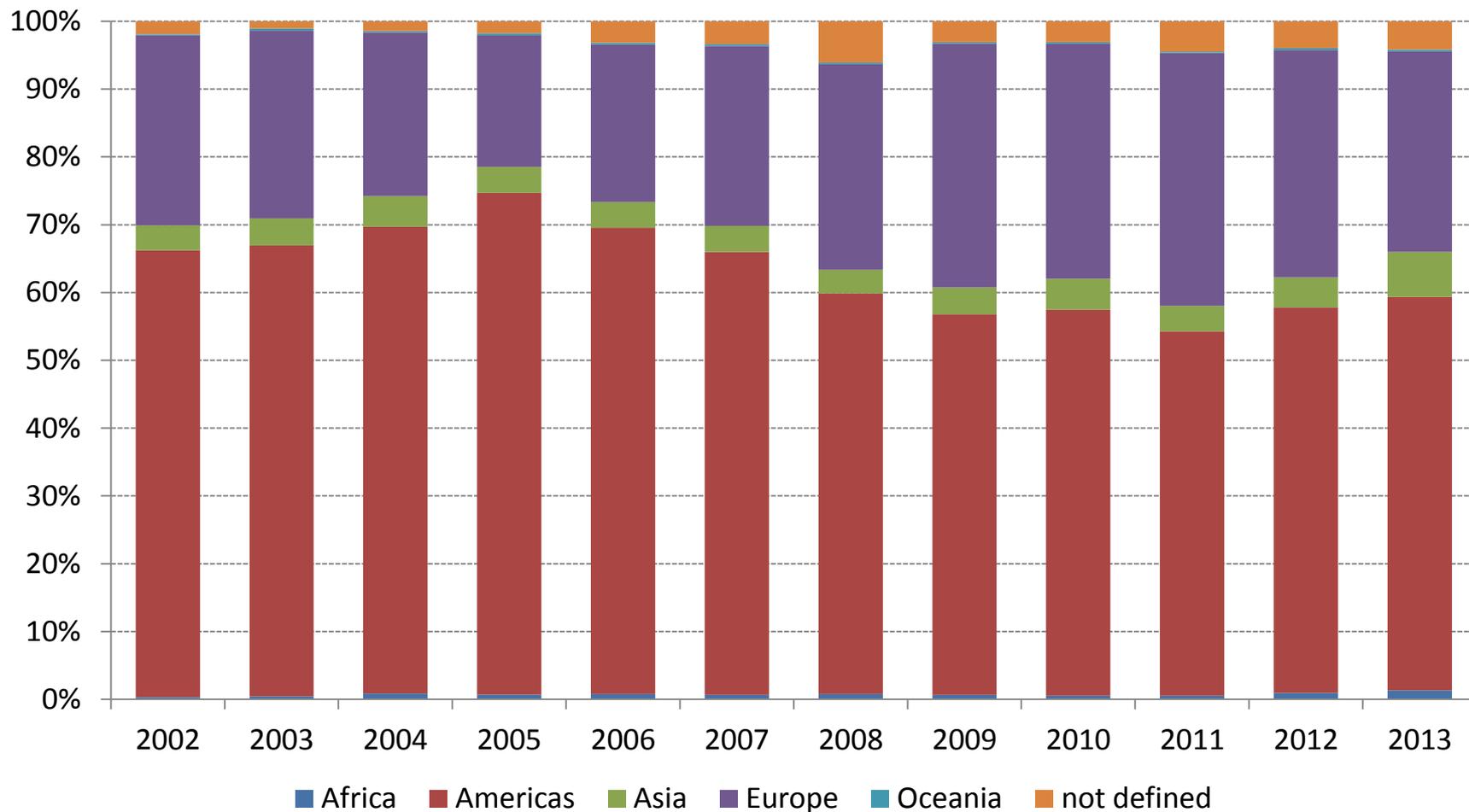
(volume metric tonnes,)





evolution of airborne exports by destination region 2002-2013

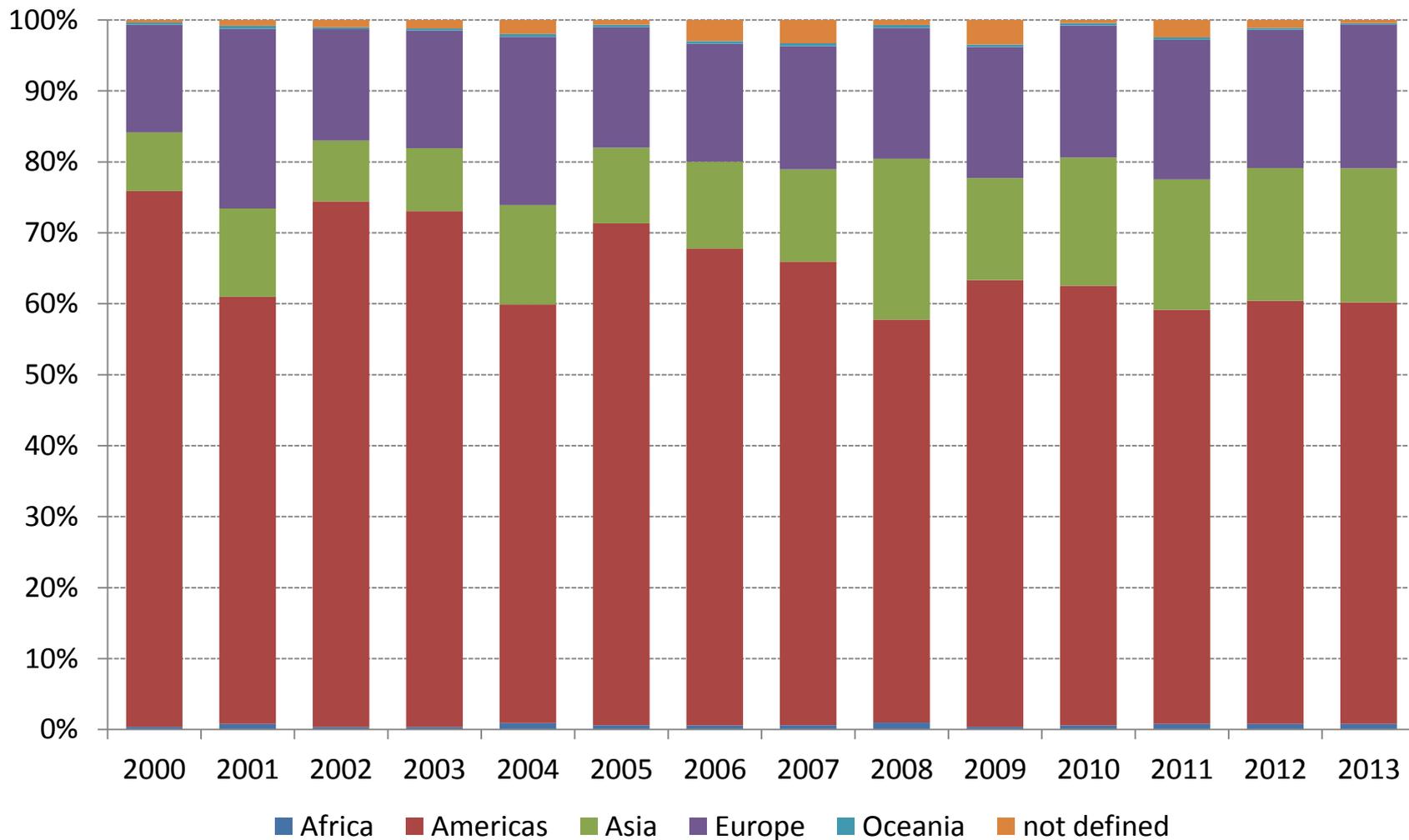
(value current USD)





evolution of airborne imports by origin 2002-2013

(value current USD)





geography of
trade

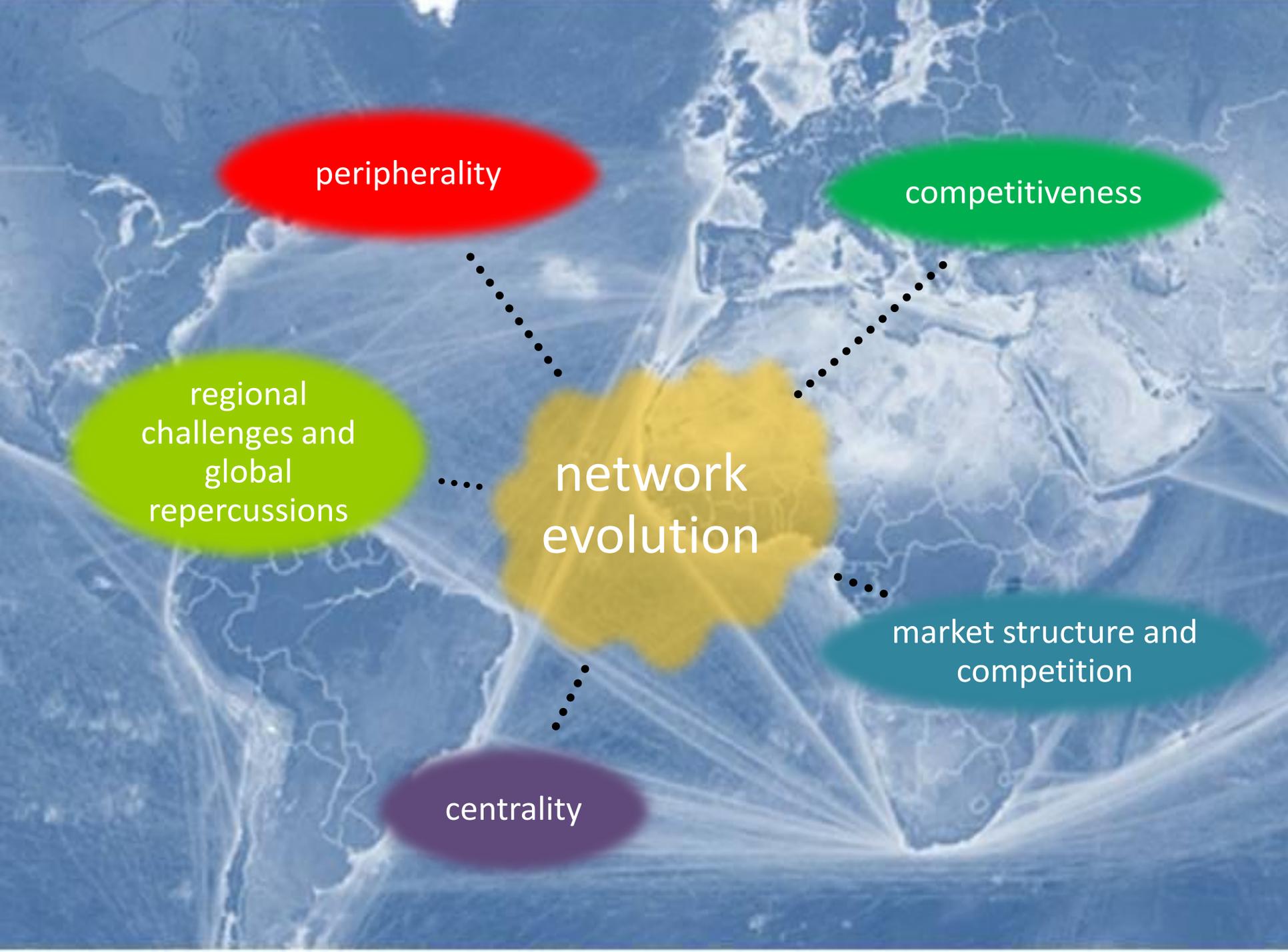
integration of transport
modes

**what are the
emerging challenges?**

structure of trade

industry
concentration

geography of
air transport
system



peripherality

competitiveness

regional
challenges and
global
repercussions

network
evolution

market structure and
competition

centrality



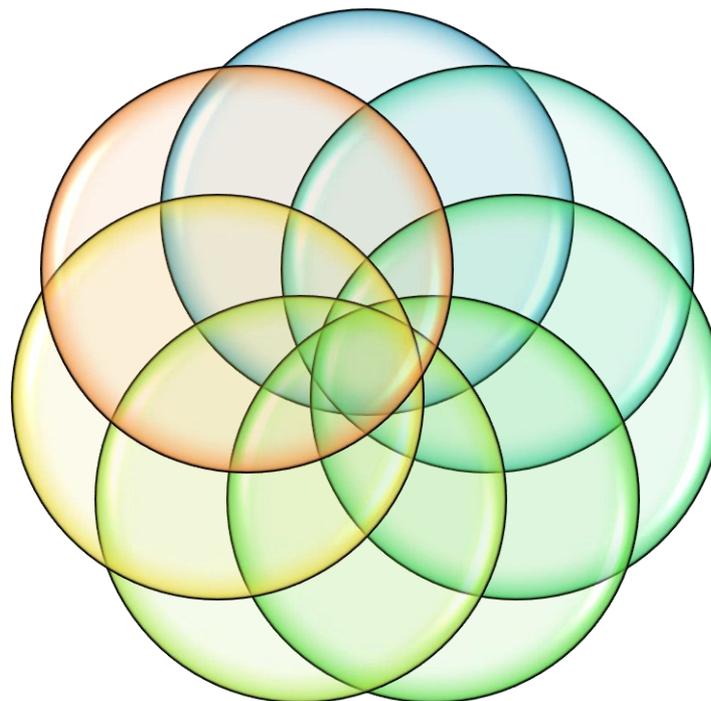
airport
development

facilitation and
border
procedures

competitiveness

rail
infrastructure

airport-
hinterland
integration



road
infrastructure

logistics
strategies



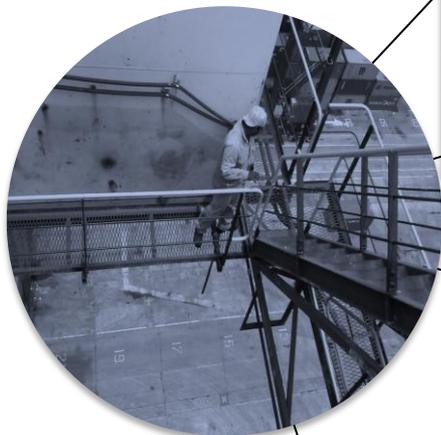
emerging issues to face future challenges

integration in logistics chains

strategies of market players

sustainable and systemic vision of
airport and hinterland
development

proactive and integrated policies and
regulatory frameworks





some questions

What are the strategies to solve capacity issues at airports

How many of the airports in our regions have intermodal connections?

Are we exploring and exploiting the air-maritime link?

How will further technological advances affect air freight?

Are we prepared to participate and compete in a new geography of transport?



logistics strategy and planning

- infrastructure, transport and logistics, are mutually dependent and therefore produce complex issues require holistic analysis and integrated solutions.
- globalized and competitive markets, require continued improvements in the quality of the products and price, hence the importance of logistics planning.
- logistics strategies and planning in particular, often is still absent from public policy
- most countries still develop transport policies focus in one mode and not in terms of the overall competitiveness, efficiency and applying sustainability criteria
- very few countries monitor their progress and advances in logistics performance



main challenges

- to align the conception, design, implementation, monitoring and control of policies related to infrastructure and services to maximize their impact on development, requiring the review of policies for infrastructure services.
- to improve the policies related to infrastructure and logistics services to maximize their impact on development.
- to integrate sustainability principles in current and future policies and strategies



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questions?

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