

Estonia Shipping Report Q3 2015

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Date: June 2015

Pages: 92

Price: US\$ 1,295.00 (Single User License)

ID: E1D97DBC210EN

Abstracts

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Estonia's Port of Tallinn will see slightly faster growth in tonnage and box throughput in 2015 compared to 2014. Tonnage in 2014 grew by only 0.3%, but this was the first expansion after three consecutive years of falling volumes, reflecting the diversion of Russian transit traffic to the rival port of Ust-Luga. Despite continuing concerns over trade with Russia, we believe both bulk tonnage and box traffic is now back on a sustainable growth path, reflecting a moderate but continuing domestic economic recovery and diversification of trade.

Our overall view of the Estonian economy this year is upbeat, based on the hypothesis that strong real incomes, low inflation, and low unemployment will continue to support a revival in domestic consumption that will drive the economy forward. The foreign trade picture is mixed with difficulties experienced by two important trade partners - Russia and Finland - having a negative effect. This is being offset however by resilient demand for Estonian exports (particularly electronic good production and wooden products) from Scandinavian countries - Sweden, Norway and Denmark. This has been a factor in lifting first-quarter Estonian industrial production. Still, bearing in mind the external headwinds, we are now predicting 2015 GDP growth of 2.2% (down on our previous estimate of 2.8% but still higher than the 2.1% recorded in 2014).

Contents

BMI Industry View

SWOT

Shipping

Political

Economic

Operational Risk

Industry Forecast

Port Of Tallinn Throughput

Table: Major Ports Data (Estonia 2012-2019)

Table: Trade Overview (Estonia 2012-2019)

Table: Key Trade Indicators (Estonia 2012-2019)

Table: Top Import Partners, 2006-2013

Table: Top Export Destinations 2006-2013

Market Overview

Estonia Container Shipping Market Overview

Shipping - Global Industry View

Three Container Routes To Watch In 2015

Global Company Strategy

Maersk Line

Mediterranean Shipping Company (MSC)

CMA CGM

Evergreen Line

COSCO Container Lines Company (COSCON)

Macroeconomic Forecasts

Economic Analysis

Table: Economic Activity (Estonia 2010-2019)

Demographic Forecast

Table: Population Headline Indicators (Estonia 1990-2025)

Table: Key Population Ratios (Estonia 1990-2025)

Table: Urban/Rural Population & Life Expectancy (Estonia 1990-2025)

Table: Population By Age Group (Estonia 1990-2025)

Table: Population By Age Group % (Estonia 1990-2025)

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