

Latvia Shipping Report Q1 2016

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Abstracts

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BMI View: We expect positive but slow growth across the main Latvian ports in 2016 with the latest statistics from the port of Riga, the country's largest port, indicating a trend of increased liquid bulk tonnage and decreasing general cargo volumes while the largest cargo type, dry bulk, remains at consistent levels. These trends are projected in our 2015 estimates of modest growth in tonnage throughput and a decrease in container traffic at the port of Riga. BMI's more positive outlook for 2016 is supported by an anticipated recovery in Russian import demand and continued steady trade growth in other main partners such as Lithuania, Estonia and Germany.

Over the medium term (2017-2019) we forecast total trade growth to average 2.5%, stimulating slow but steady growth in throughput volumes at Latvian ports. Real GDP growth over the period is forecast to average 3.0%, unemployment to fall from 9.0% in 2016 to 7.0% by 2019, and the active population to remain above 64%. Even with inflation anticipated to remain at low levels (2.7% in 2019), the country's economic performance will not significantly boost consumer demand and imports. Sustained growth in demand for imports in main trading partner countries will, however, drive Latvian export volumes, with exports anticipated to grow slightly more quickly than imports.

Contents

BMI Industry View

SWOT

Shipping

Political

Economic

Operational Risk

Industry Forecast

Port Of Riga Throughput

Table: Major Ports Data (Latvia 2012-2019)

Table: Trade Overview (Latvia 2012-2019)

Table: Key Trade Indicators (Latvia 2012-2019)

Table: Top Import Partners, 2006-2013 (USDmn)

Table: Top Export Destinations, 2006-2013 (USDmn)

Market Overview

Latvia Container Shipping Market Overview

Company Profile

Latvian Shipping Company

Shipping - Global Industry View

Bright Spot For Shipping: Low Bunker Prices

Table: BMI Bunker Fuel (IFO180 & MGO) Price Forecast

Short-Term Outlook (three-to-six months)

Long-Term Outlook

Risks To Outlook

Global Company Strategy

Maersk Line

Mediterranean Shipping Company (MSC)

CMA CGM

Evergreen Line

COSCO Container Lines Company (COSCON)

Macroeconomic Forecasts

Economic Analysis

Demographic Forecast

Table: Population Headline Indicators (Latvia 1990-2025)

Table: Key Population Ratios (Latvia 1990-2025)

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

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

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

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