

Argentina - Transport and Logistics: Growth driven by higher volumes (Strategy, Performance and Risk Analysis)

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Abstracts

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SUMMARY

According to the World Bank's Logistics Performance Index, Argentina's rank improved from 85th in 2014 to 76th in 2016, placing higher than Colombia and Venezuela - 129th position and 145th, respectively. Compared to the regional trend, GVA for transport and logistics rose at a higher rate during the historic period at a CAGR of 3.1%, from US\$18.5bn in 2012 to US\$21.6bn in 2017.

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Key highlights

Increase in passengers and freight traffic to drive GVA growth

Globally, transport and logistics GVA recorded a CAGR of 2.6%, from US\$3.2tn in 2012 to US\$3.7tn in 2017, and is anticipated to post a CAGR of 5.7%, from US\$3.9tn in 2018 to US\$4.8tn in 2022. The increase is primarily due to the expansion of freight traffic and volume in the US, China and India.

Lack of modernization leading to decline in rail freight volume

Rail freight in South and Central America recorded a CAGR of 2.9%, rising from 310.5 billion ton kms in 2012 to 358.2 billion ton kms in 2017. It is anticipated to post a CAGR of 3.7%, rising from 369.2 billion ton kms in 2018 to 426.9 billion ton kms in 2022. The increase will be primarily due to strong growth in the rail freight segment in Brazil due to a demand for iron ore, one of Brazil's main exports.

Increase in the number of air passengers to drive active fleet growth

In Argentina, the active fleet size recorded a CAGR of 18.6% from 43 aircraft in 2012 to 101 in 2017, and is forecast to post a CAGR of 9.0%, from 126 units in 2018 to 161 in 2022. Growth can be primarily attributed to an increase in procurement by airlines such as Aerolineas Argentinas due to the rising volume of passengers.

SCOPE

Risk & Reward Index: The Risk & Reward index compares the position of Argentina's transport and logistics industry with other countries in the region in terms of specific risk and reward parameters.

Industry Snapshot and Industry View: Key transport and logistics industry statistics include freight traffic, freight volume, fleet size, passengers, import and export gross value added, FDI and trends driving market performance.

Industry SWOT Analysis: Discover the strengths, weaknesses, opportunities and threats impacting market performance and investment in Argentina's transport and logistics market.

Industry Benchmarking: Benchmark how Argentina's transport and logistics market is performing compared to regional and global markets in terms of GVA, fleet size and freight traffic by mode.

Competitive Landscape: Overview of industry players compared with their peers across a set of indicators.

REASONS TO BUY

How is the market performing in terms of indicators such as freight traffic, freight volume, fleet size, passengers, import and export, gross value added and FDI?

How risky is it to invest in the Argentina transport and logistics industry compared to other countries in South America?

What is driving the performance of key industry segments such as land, air, water and rail?

Who are the leading players in the Argentina transport and logistics industry and their presence in respective segment?

What trends are being witnessed within the Argentina transport and logistics industry?

What are the Argentina transport and logistics industry's Strengths and Weaknesses and what Opportunities and Threats does it face?

What are the recent developments and innovations in the Argentina transport and logistics industry?

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