

Australia - Transport and Logistics: Government investments to drive growth (Strategy, Performance and Risk Analysis)

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Abstracts

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SUMMARY

The Australian Government committed infrastructure funding of US\$57.6bn for 2013-2027 to develop transport networks. This includes Western Sydney Airport, which will provide additional capacity to meet the region's growing tourism demands. In addition, the Murray Basin Freight Rail Project, expected to be complete by the end of 2018, will improve the country's rail freight network and enhance connectivity with the ports of Geelong, Portland, and Melbourne. Shipping companies are making significant investments in advanced technologies such as cloud computing, the internet of things (IoT) and robotics. All of this will drive the efficiency of transport operations.

MarketLine's Premium industry reports provide a comprehensive overview of the market and include sections on: risk and reward, key industry trends and drivers, SWOT analysis, competitive landscape, innovation, deals, key developments, and industry benchmarking to compare key performance indicators with regional and global markets.

Key highlights

Increase in traffic to drive road transport GVA

Australia's, road transport GVA registered a CAGR of -5.3%, falling from US\$24.1bn in 2012 to US\$18.3bn in 2017. It is anticipated to post a CAGR of 1.0%, from US\$19.4bn

in 2018 to US\$20.2bn in 2022. An increase in freight and passenger traffic will drive road transportation GVA.

Air transport GVA to increase over the forecasted period

Air transport GVA registered a CAGR of -2.4%, from US\$8.4bn in 2012 to US\$7.4bn in 2017, but is anticipated to post a CAGR of 4.8%, from US\$8.1bn in 2018 to US\$9.8bn in 2022 due to a renewed government focus on connectivity. In the 2015-2016 budget, the government announced US\$26.1m in funding spread over a period of four years for remote aerodrome upgrades under the Regional Aviation Access Programme (RAAP) - Remote Airstrip Upgrade Funding Component.

New entrants to drive port capacity

Australia's port container storage capacity recorded a CAGR of 2.8%, rising from 7.0 million tons in 2012 to 8.0 million tons in 2017 and is anticipated to post a CAGR of 3.0%, from 8.2 million tons in 2018 to 9.3 million tons in 2022. The capacity increase will primarily be due to new entrants in the port sector. Hutchison Ports Australia began the operation of a container terminal at Brisbane in January 2013 and one in Sydney in November of the same year. In 2017, Victoria International Container Terminal (VICT) entered container stevedoring industry in Australia. VICT's Webb Dock in Melbourne is the first Australian stevedore to fully automate its terminal operations.

SCOPE

Risk & Reward Index: The Risk & Reward index compares the position of the Australian 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 exports 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 the Australian transport and logistics market.

Industry Benchmarking: Benchmark how the Australian 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 Australian transport and logistics industry compared to other countries in Asia Pacific?

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

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

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

What are the Australian 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 Australian transport and logistics industry?

Contents

Risk and Reward Index
Industry Snapshot
Industry View
Industry SWOT Analysis
Industry Benchmarking
Industry Performance
Competitive Landscape
Innovation
Deals
Key Developments
Appendix

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