

Colombia - Transport and Logistics: Government projects to support industry growth (Strategy, Performance and Risk Analysis)

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Abstracts

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SUMMARY

The Colombian government is undertaking initiatives and investments in order to develop the country's infrastructure. One of the most important projects is the US\$16.0bn Fourth Generation (4G) Road Program. New infrastructure projects in growing sectors such as air and water are expected to continue to support freight volume. For instance, the modernization and expansion of more than 25 national and smaller regional airports under a US\$1bn project has been undertaken by the government to boost connectivity.

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

Increasing air freight and passengers to help drive GVA

In Colombia, air transport GVA recorded a CAGR of -6.5%, falling from US\$1,388.5m in 2012 to US\$989.8m in 2017. This was due to a decrease in international commodity prices. However, air transport GVA is anticipated to post a CAGR of 3.7%, rising from

US\$1,030.7m in 2018 to US\$1,193.3 in 2022.

Increase in inland water freight volume and passengers to boost water transport GVA

In Colombia, water transport GVA recorded a CAGR of -6.8%, from US\$170.9m in 2012 to US\$120.2m in 2017. However, water transport GVA is anticipated to post a CAGR of 3.5%, from US\$125.2m in 2018 to US\$143.8m in 2022, primarily due to an increase in the number of inland waterway passengers and freight volume, led by the implementation of transportation development program plans by the Colombian government. The freight volume of inland waterways recorded a CAGR of 3.0%, from 3,474.0 tons in 2012 to 4,032.2 tons in 2017.

Transportation and support activities GVA expected to increase

Transportation and support services GVA recorded a CAGR of -6.6%, from US\$1,303.8m in 2012 to US\$924.3m in 2017. However, it is anticipated to post a CAGR of 3.7%, from US\$963.5m in 2018 to US\$1,112.4m in 2022, primarily due to an increase in the demand for land transport support activities, such as mechanics. The country's road fleet size is anticipated to post a CAGR of 5.9%, from 6.3 million in 2018 to 8.0 million in 2022.

SCOPE

Risk & Reward Index: The Risk & Reward index compares the position of Colombia'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 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 Colombia's transport and logistics market.

Industry Benchmarking: Benchmark how Colombia'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 Colombian transport and logistics industry compared to other countries in South and Central America?

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

Who are the leading players in the Colombian transport and logistics industry and what is their presence in their respective segments?

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

What are the Colombian 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 Colombian transport and logistics industry?

Contents

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

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