

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

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## Abstracts

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### SUMMARY

South Korea is a growth economy. Nominal GDP registered a CAGR of 4.4%, rising from US\$1.2 trillion in 2012 to US\$1.5 trillion in 2017, and is anticipated to post a CAGR of 3.7%, to reach US\$1.8 trillion in 2022. This will be due in part to export growth. The country has strong political and economic support from the US. South Korea's infrastructure is some of the most advanced in the world and scores higher than both the global and regional median on this parameter. Evidently, the country has a well-developed network of roads, airways and waterways yet it is the presence of advanced infrastructure that provides growth opportunities for the transportation and warehousing sectors.

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 international trade to drive air freight

Air transport freight in South Korea recorded a CAGR of -1.0%, falling from 12.3 billion

ton km in 2012 to 11.7 billion ton km in 2017, but is anticipated to post a CAGR of 2.4%, from 11.9 billion ton km in 2018 to 13.1 billion ton km in 2022. The increase will be driven by a global demand for air cargo services due to the popularity of e-commerce platforms. Incheon International Airport's plan to expand its capacity due to demand from Japan and Southeast Asia, Europe and the Americas.

#### Korea Shipping Partnership to drive freight volume

Water transport freight volume registered a CAGR of 0.1%, from 1,728.0 million ton kms in 2012 to 1,738.4 billion in 2017, and is anticipated to post a CAGR of 0.7%, from 1,740.7 million ton km in 2018 to 1,793.1 million in 2022. Freight volume will increase as a result of the mega alliance of 14 carriers.

#### Private investments to drive warehousing and storage GVA

Warehousing and storage GVA registered a CAGR of 8.1%, rising from US\$10.9bn in 2012 to US\$16.1bn in 2017, and is anticipated to post a CAGR of 7.3%, from US\$17.4bn in 2018 to US\$23.1bn in 2022. The increase will be due in part to investments from private players. In April 2016, Nippon Express Korea Co., Ltd. completed the construction of its first wholly owned warehouse with a capacity of 18,700m<sup>2</sup> in the Busan Free Trade Zone. In November 2015, APG Asset Management and Canada Pension Plan Investment Board (CPPIB) established a joint venture platform with e-Shang and Kendall Square Logistics Properties.

## SCOPE

**Risk & Reward Index:** The Risk & Reward index compares the position of the South Korean 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 the South Korean transport and logistics market.

**Industry Benchmarking:** Benchmark how the South Korean 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 South Korean 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 South Korean transport and logistics industry and their presence in respective segment?

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

What are the South Korean 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 South Korean transport and logistics industry?

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