INSTITUTO DE ECONOMÍA INTERNACIONAL
VNIVERSITAT DE VALÈNCIA

Herramientas para analizar el tráfico marítimo.

El contexto económico internacional

Seminario ValenciaPort, 03/06/2021

Dr. Vicente J. Pallardó

Investigador Senior IEI. Universidad de Valencia

Estructura de la presentación

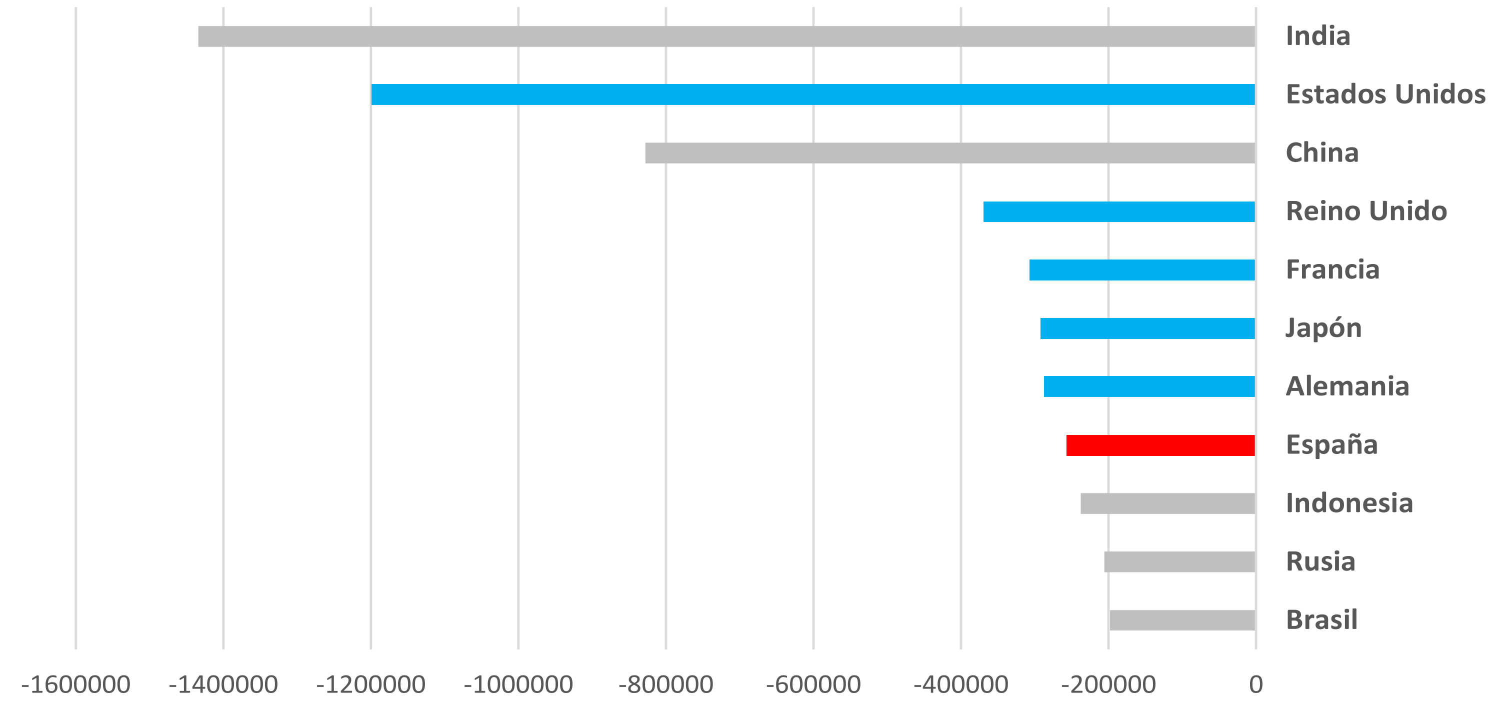
- El impacto de la COVID-19: rasgos singulares
- Conteniendo la crisis: claves de un (relativo) éxito
- Los retos del futuro: lo difícil está por llegar

El impacto de la pandemia

- Shocks adversos consecutivos de oferta y demanda.
  - Impacto más intenso sobre la demanda. Presión a la baja sobre precios
- Los servicios de proximidad, sector más dañado
- Stop & go
  - Pandemia... y otros (microchips, accidentes, ciberterrorismo)
- Occidente, más damnificado
  - La experiencia como valor. Resto, a determinar (importante de cara al futuro)
    - Ojo al exceso de confianza

El impacto de la pandemia

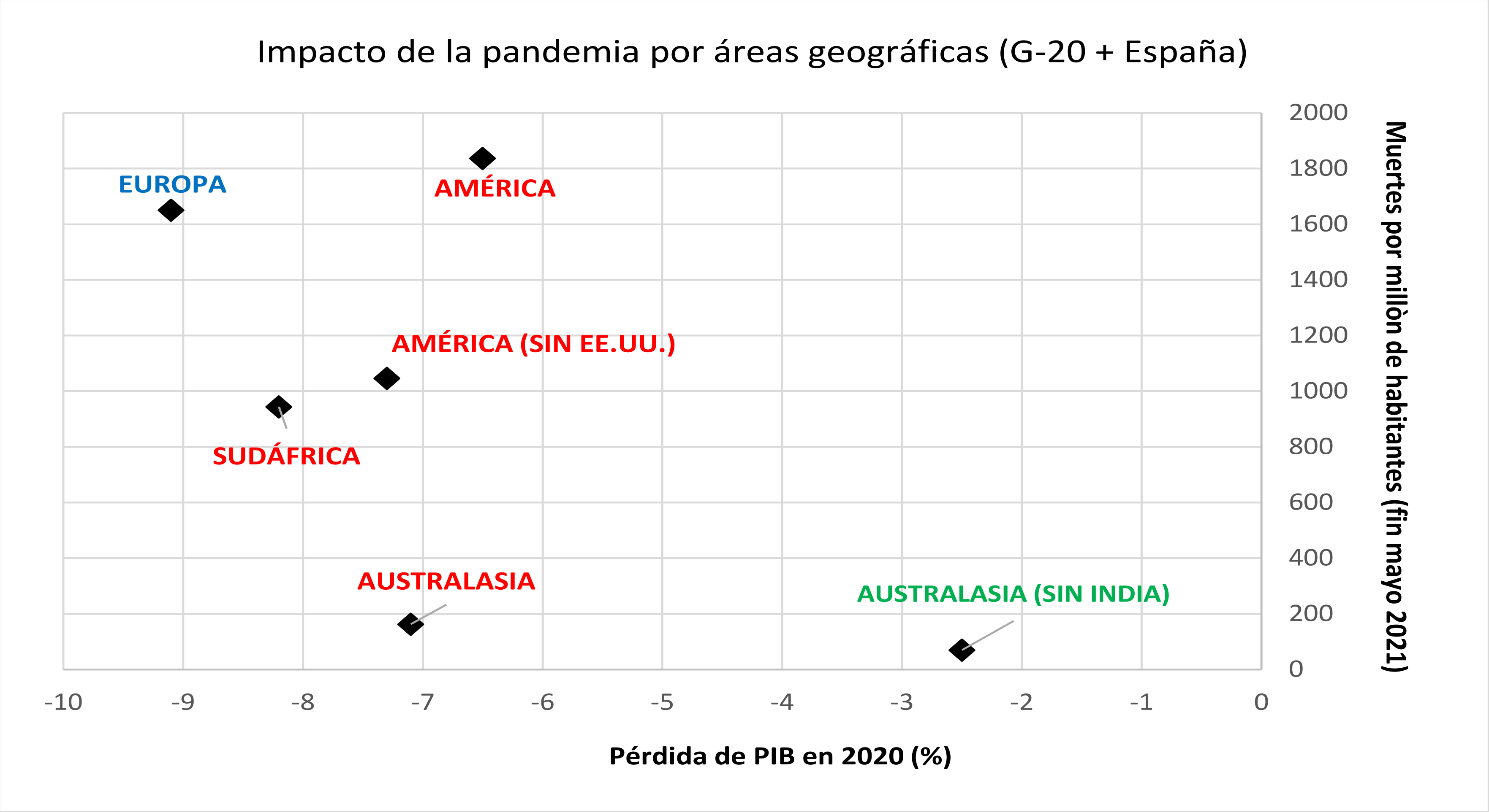
Desviación del PIB real en 2020 (millones de US$, PPA)



Fuente: elaboración propia. Datos: FMI

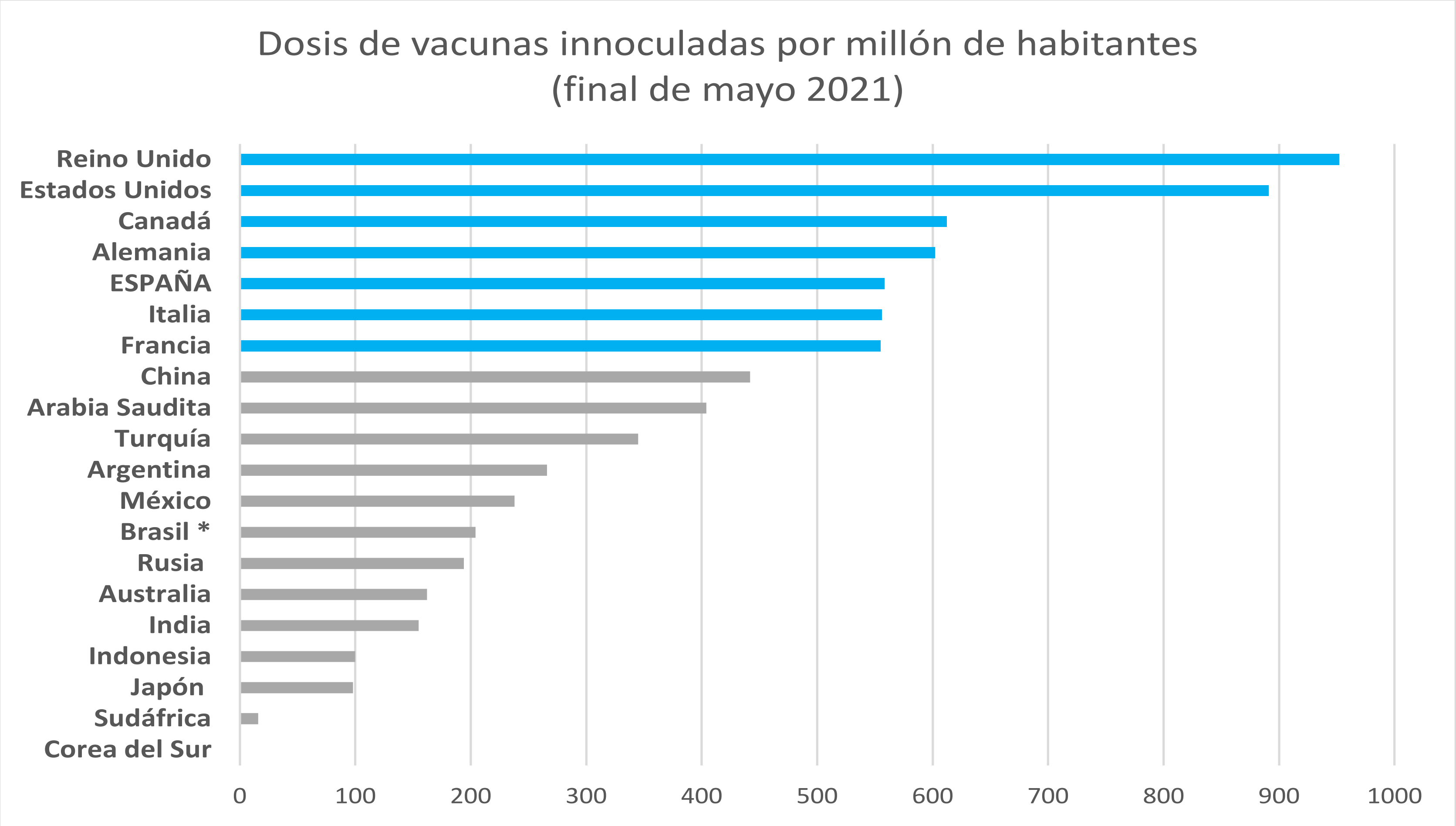
Impacto 2020 (billones US$, PPA)	
Global	8,9
P. Desarrollados	5,2
P. Emerg & PVD	3,7

El impacto de la pandemia



Fuente: elaboración propia. Datos: FMI; Universidad Johns Hopkins

El impacto de la pandemia

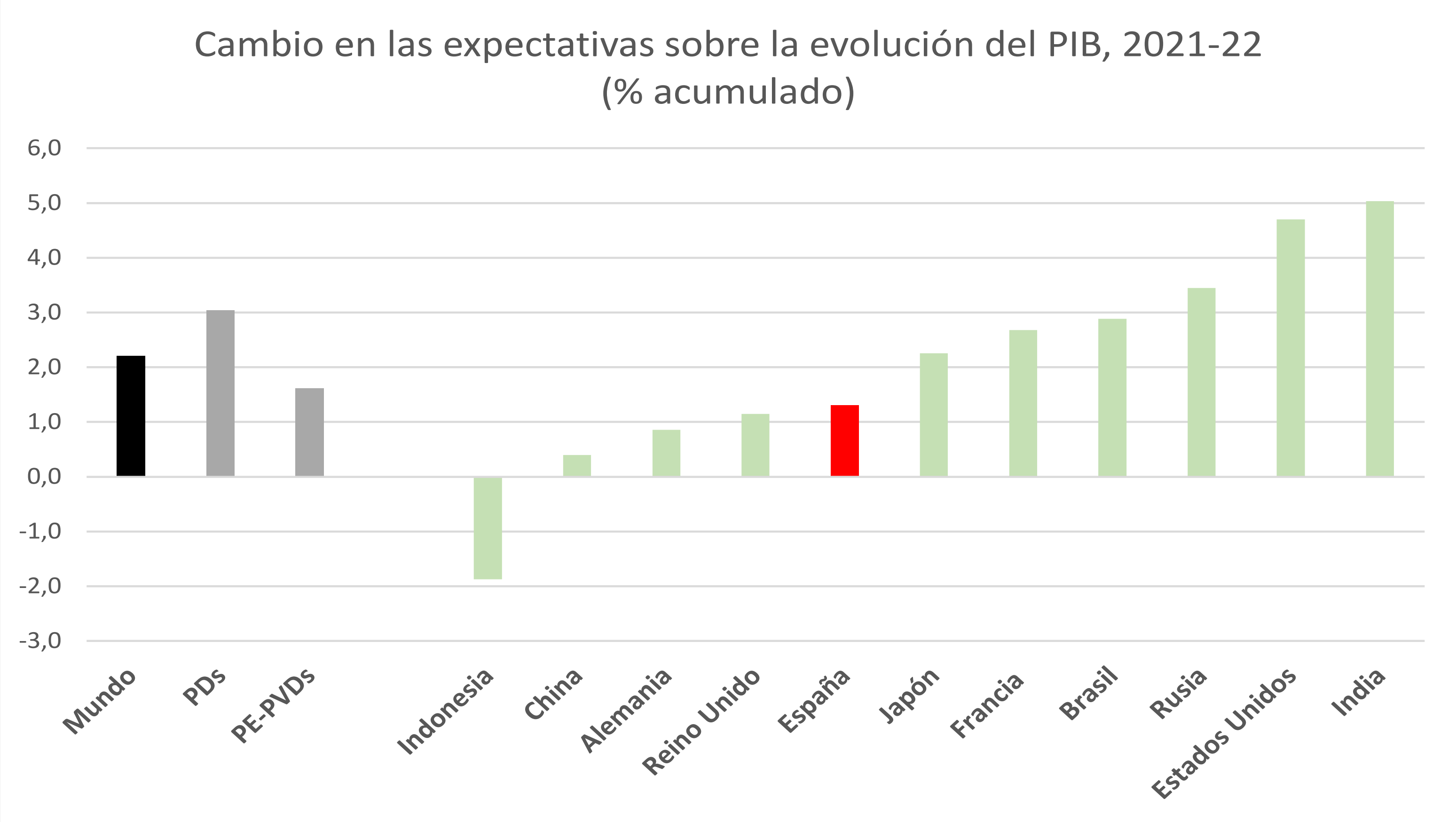


Fuente: elaboración propia. Datos: Universidad Johns Hopkins; fuentes nacionales

Una crisis contenida

- Menor impacto de lo esperado hace tan solo unos meses
  - Éxito científico y logístico: vacunas
  - Adaptación progresiva de los diferentes sectores
  - La respuesta de las políticas macroeconómicas
    - Con mucha diferencia, países desarrollados
- ¿Una "wild card"?

Una crisis contenida



Fuente: elaboración propia. Datos: FMI

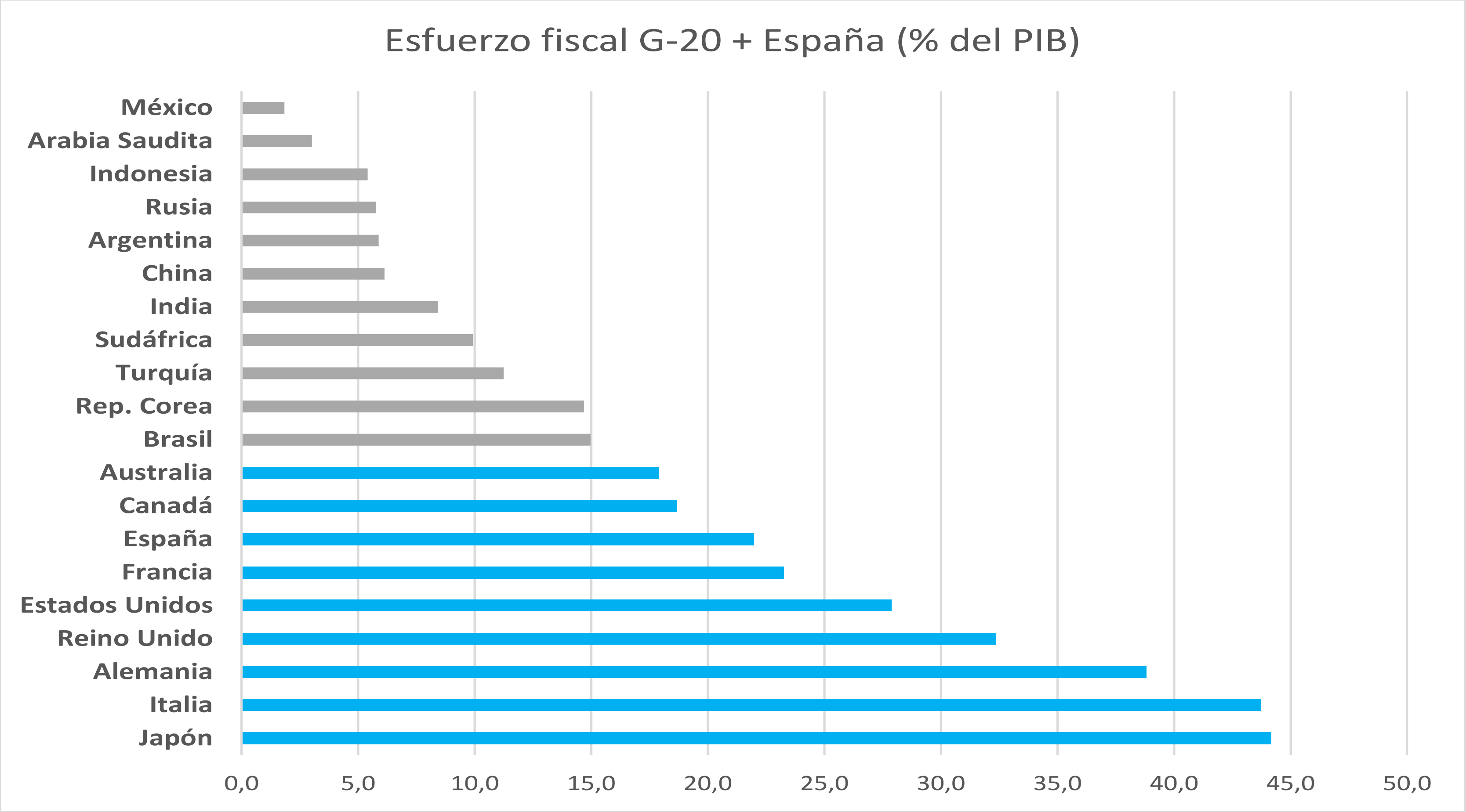
Intensificación de la recuperación 2021-22 (billones US$, PPA)	
Global	3,0
P. Desarrollados	1,8
P. Emerg & PVD	1,2

Una crisis contenida

Política	VELOCIDAD RESPUESTA	COORDINACIÓN INTERNACIONAL	MECANISMOS ADECUADOS	TEMPORALIDAD BIEN DEFINIDA	EFECTIVIDAD
Monetaria					
Fiscal					
Cambiaria	Se evita, con carácter general, la manipulación cambiaria tendente a favorecer las exportaciones				
Macroprudencial					

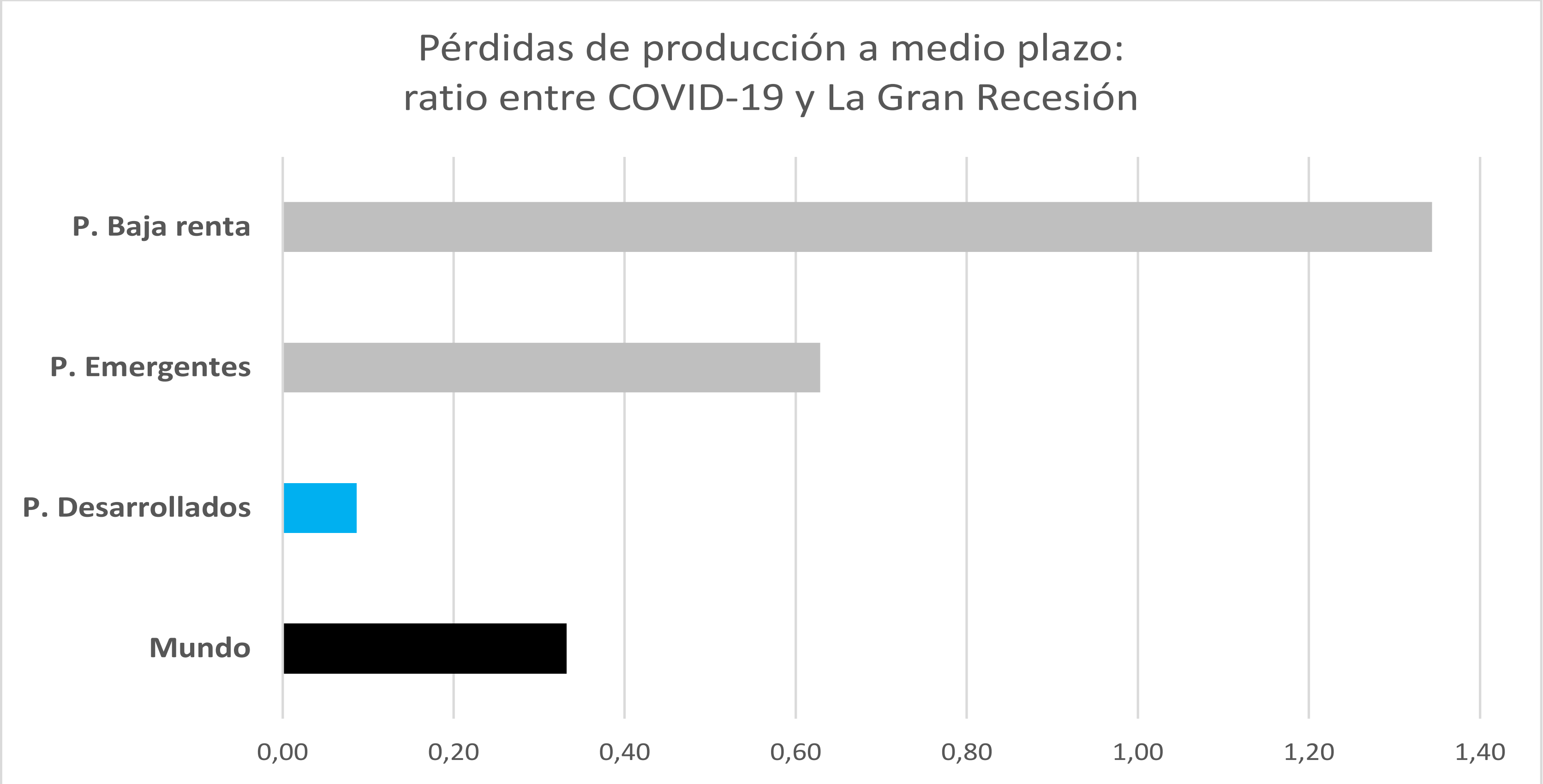
Fuente: elaboración propia.

Una crisis contenida



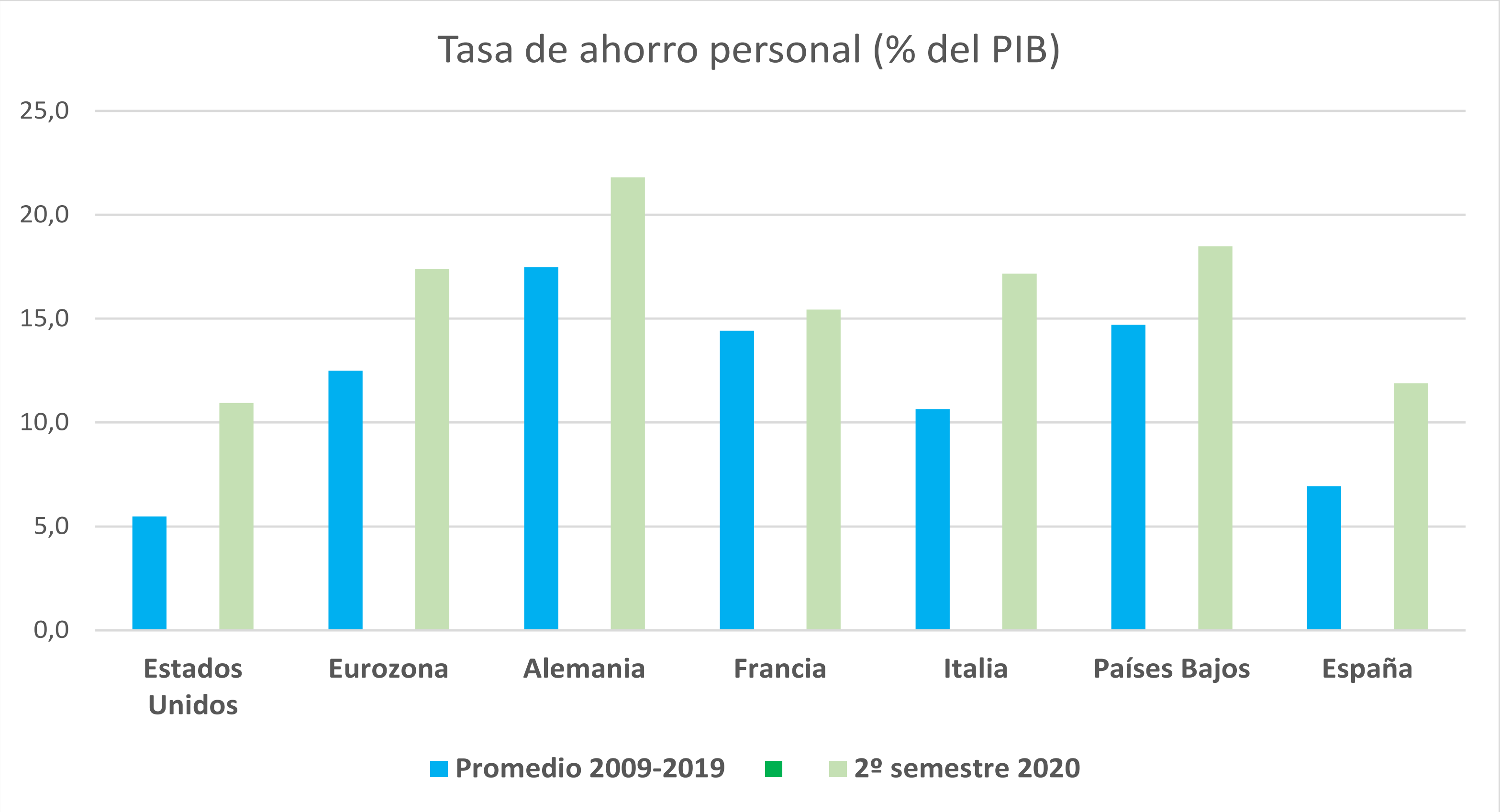
Fuente: elaboración propia. Datos: FMI

Una crisis contenida



Fuente: elaboración propia. Datos: FMI

Una crisis contenida



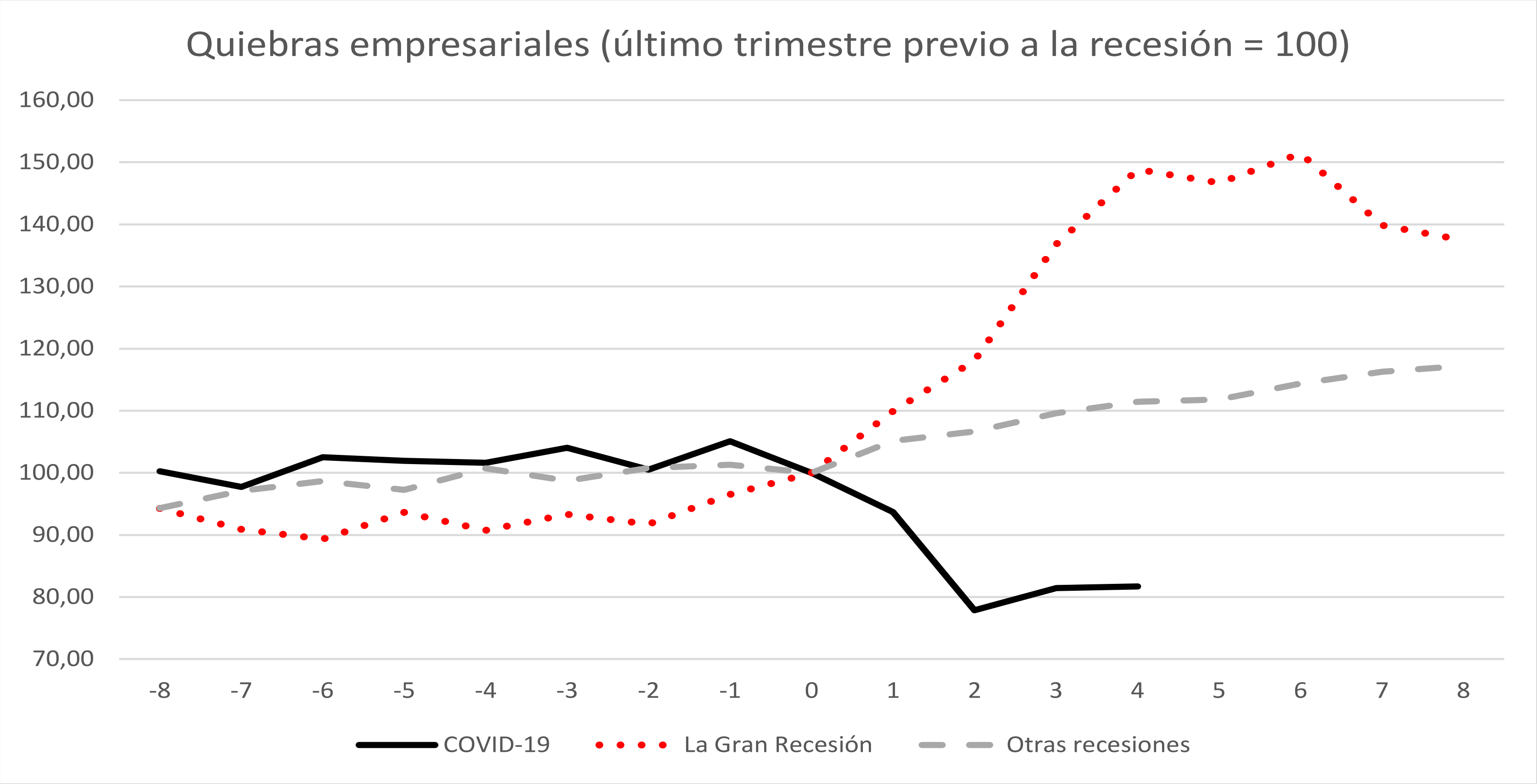
Fuente: elaboración propia. Datos: FMI

Los retos de futuro

- La “zombificación” de la economía: empresas y empleos.
  - Coste posterior para sector público y sistema bancario.
  - Obstáculo al surgimiento de nuevos proyectos intrasectoriales
  - Limitaciones a los cambios intersectoriales estructurales
- ¿El regreso de la inflación?
  - Ojalá fuera ese el problema…
- ¿Qué hacemos con la deuda pública?

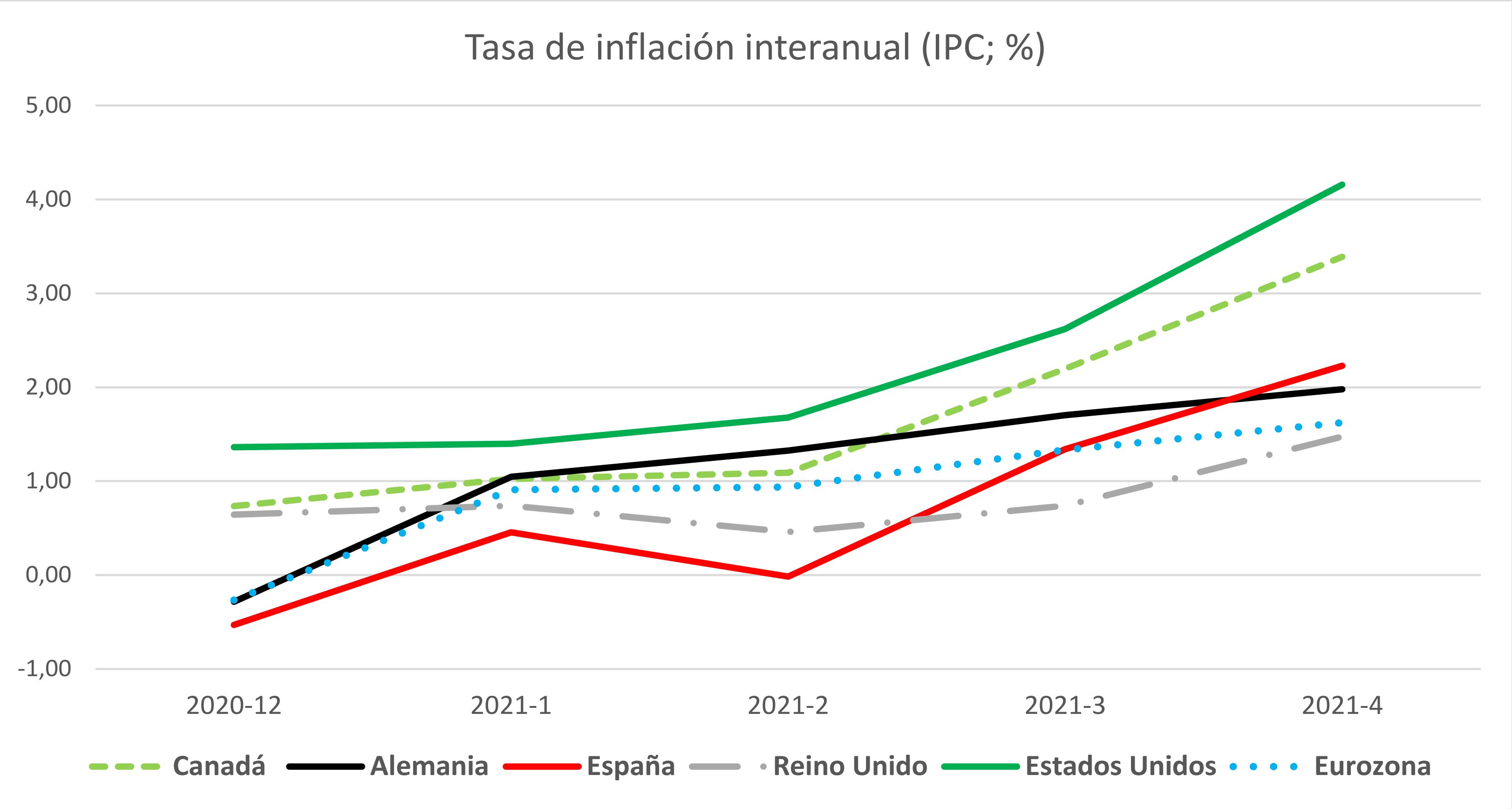
- Y nos quedan los retos estructurales…

Los retos de futuro



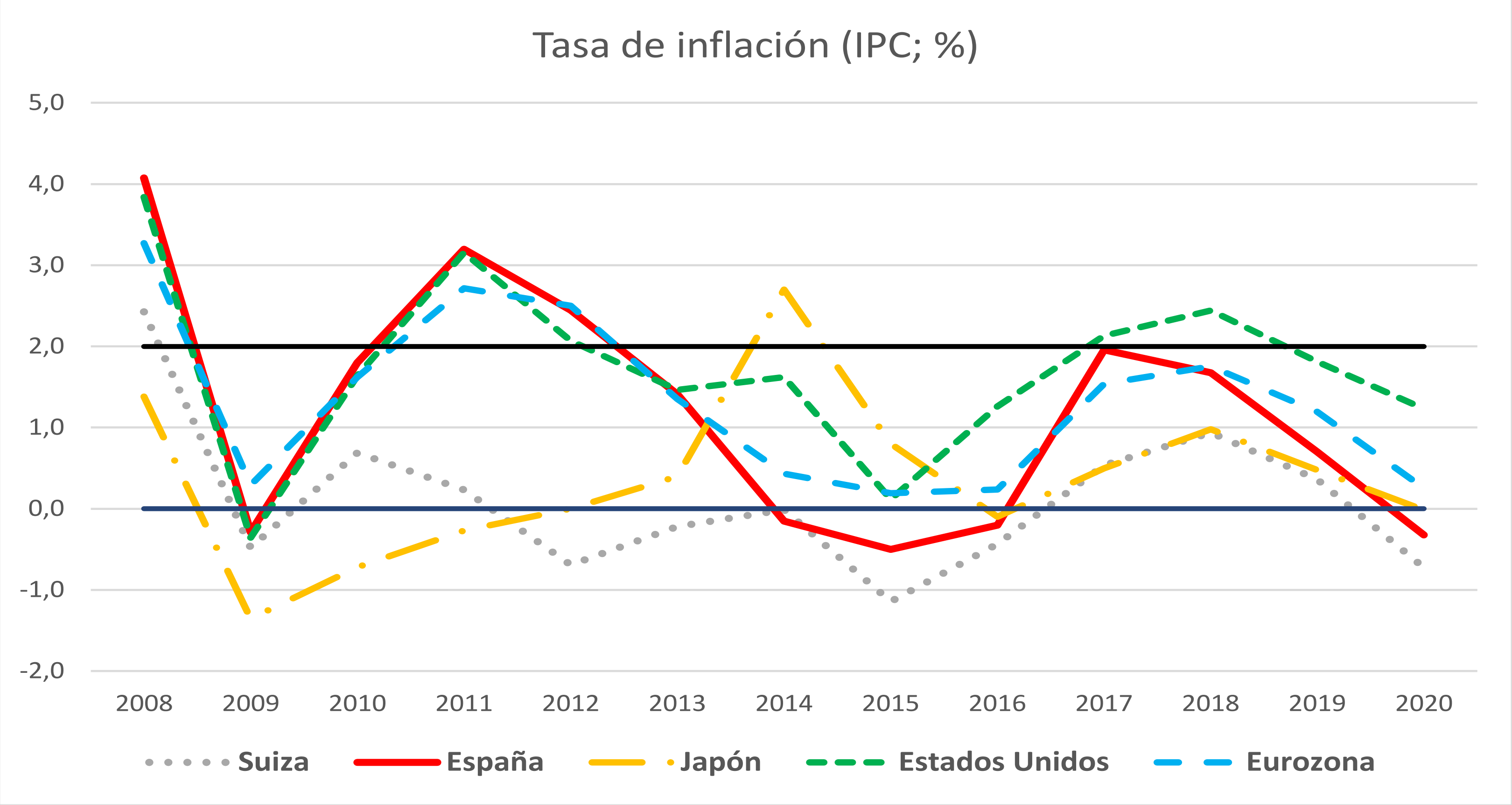
Fuente: elaboración propia. Datos: FMI

Los retos de futuro



Fuente: elaboración propia. Datos: BIS

Los retos de futuro



Fuente: elaboración propia. Datos: BIS

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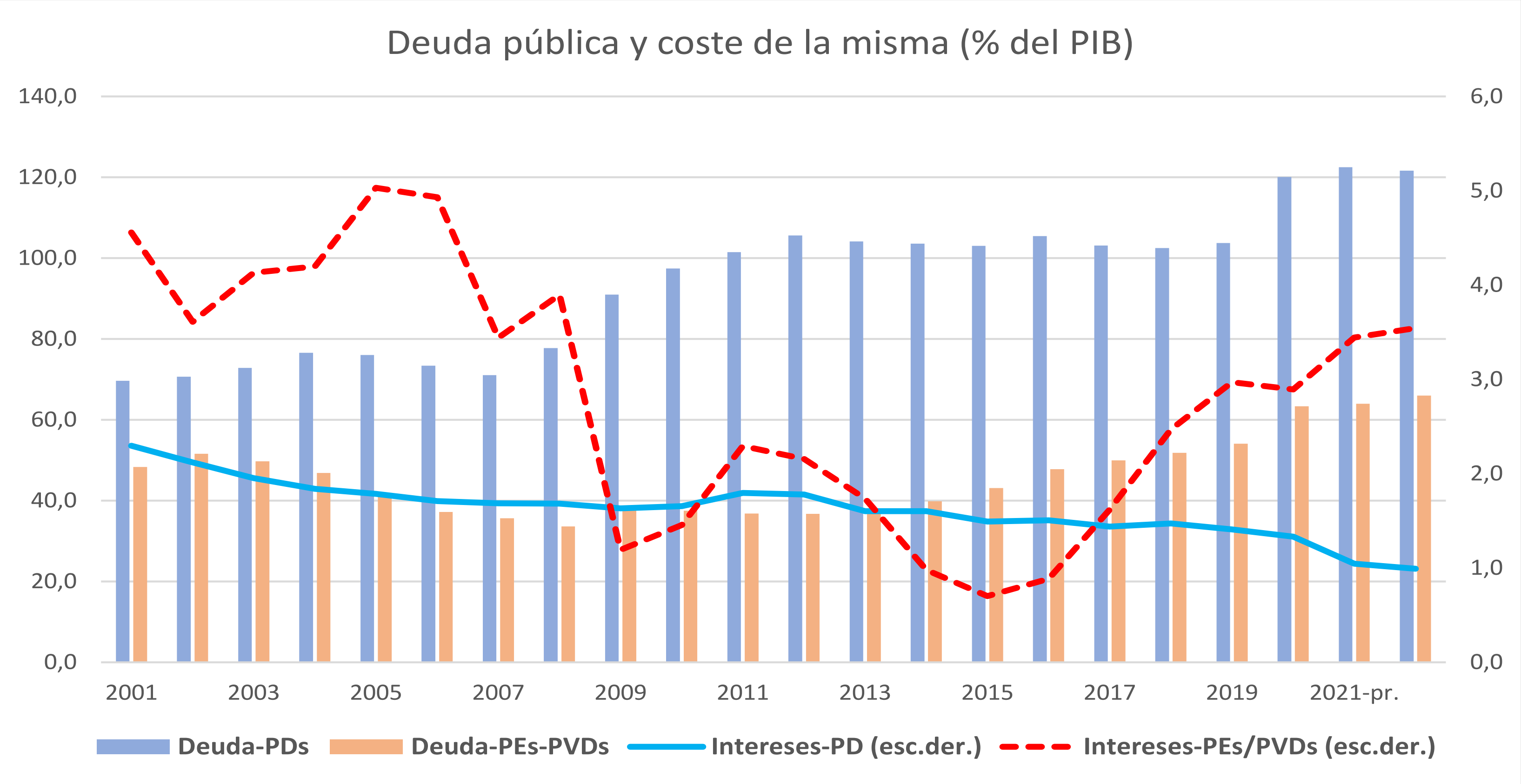
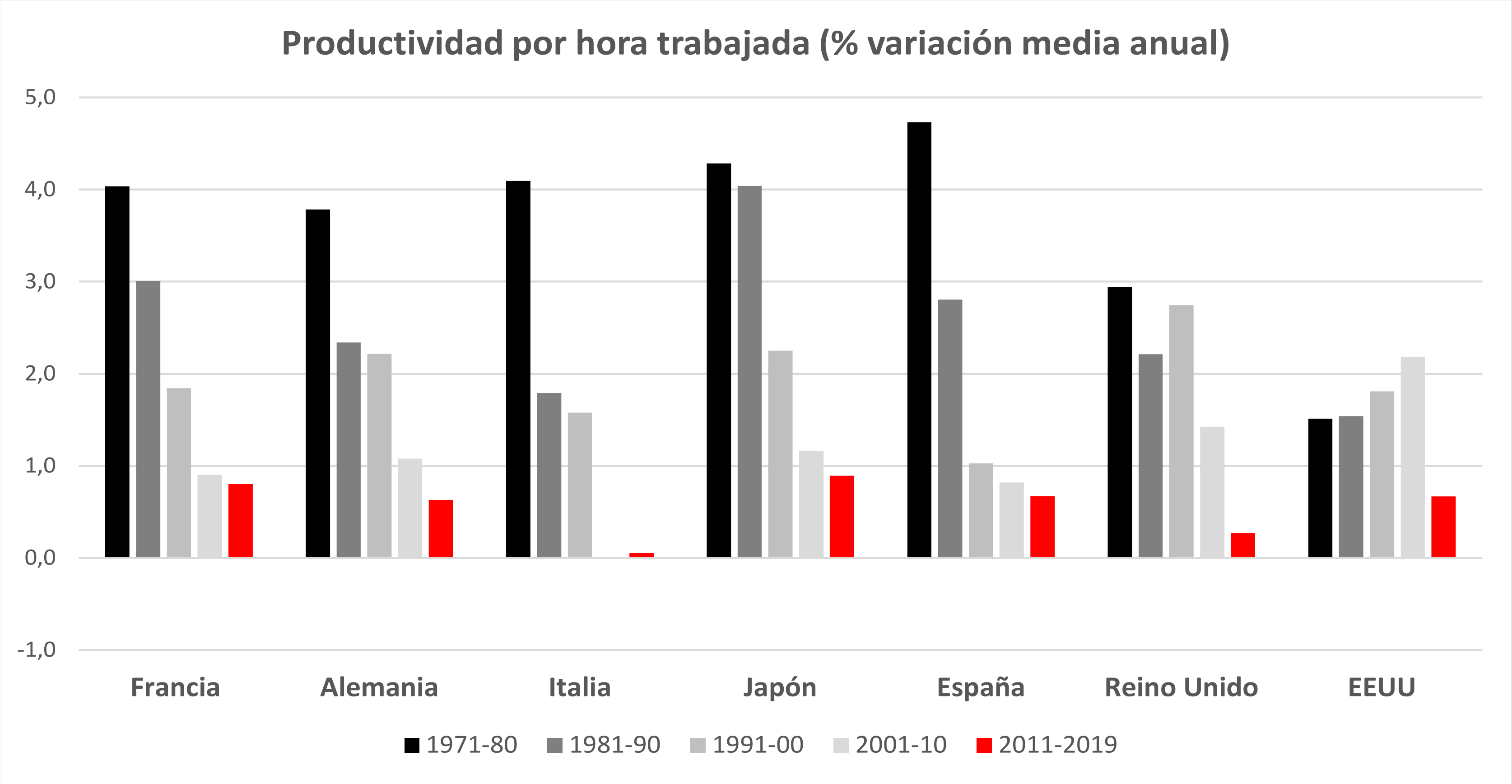
Los retos de futuro



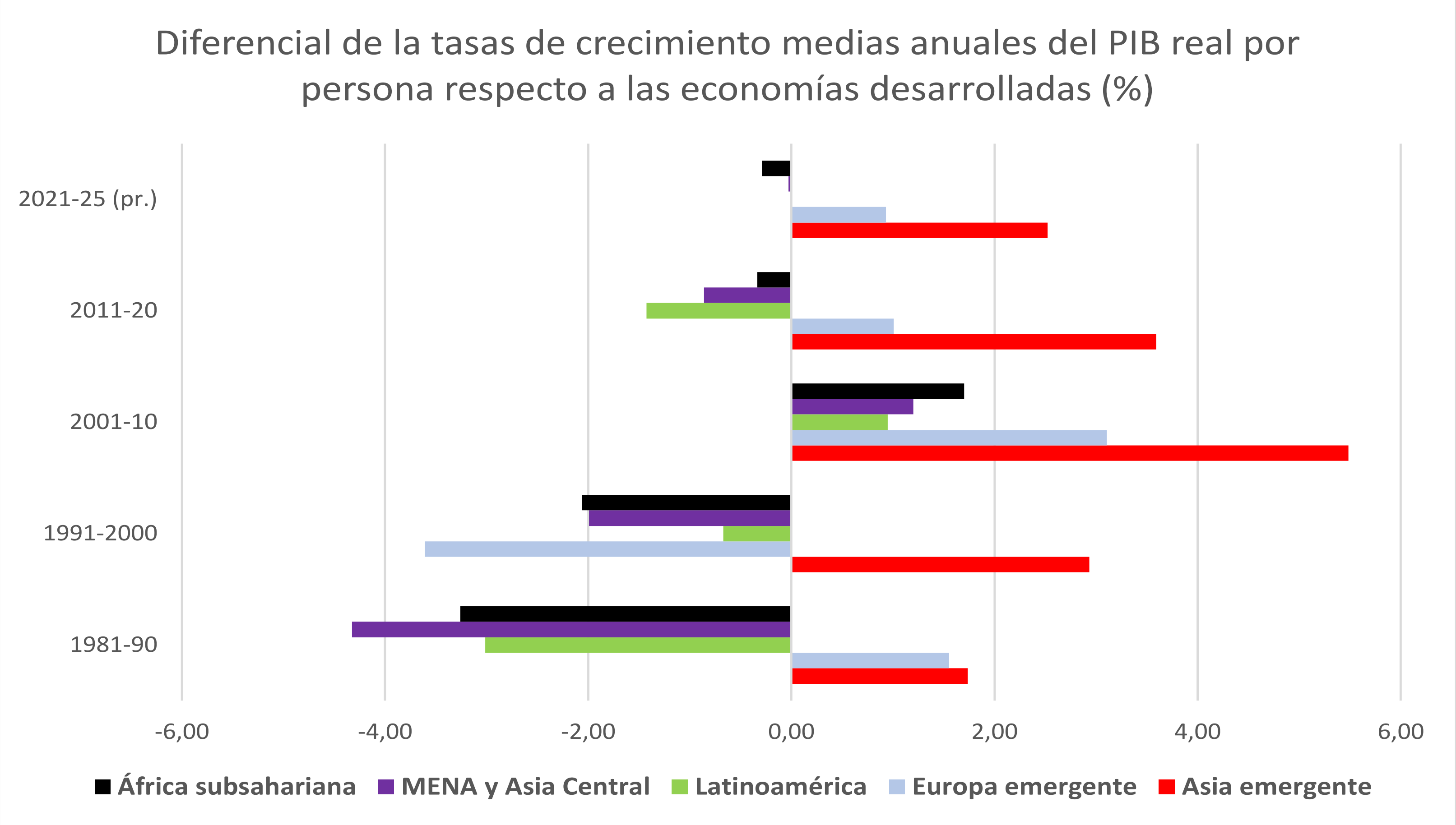
Fuente: elaboración propia. Datos: FMI

Los retos de futuro



Fuente: elaboración propia. Datos: OCDE

Los retos de futuro



Fuente: elaboración propia. Datos: FMI

Los retos de futuro

- MUCHO TRABAJO POR DELANTE MÁS ALLÁ DE LA PANDEMIA

GRACIAS POR LA ATENCIÓN

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Herramientas para analizar el mercado marítimo

2021 3 Junio

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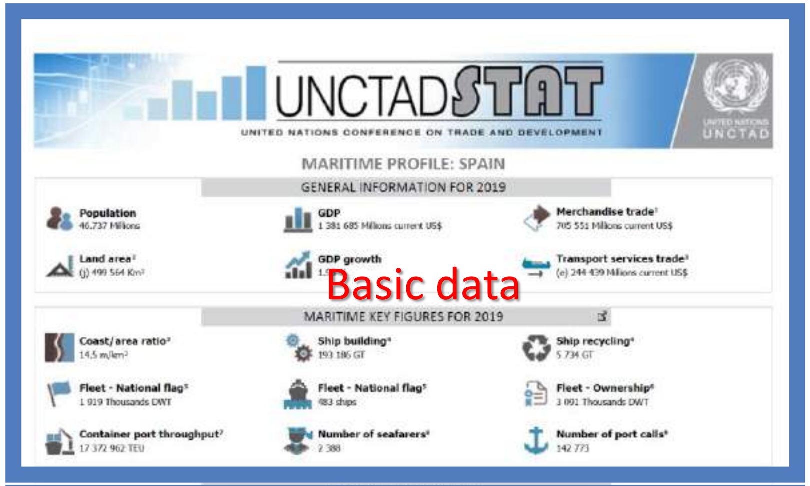
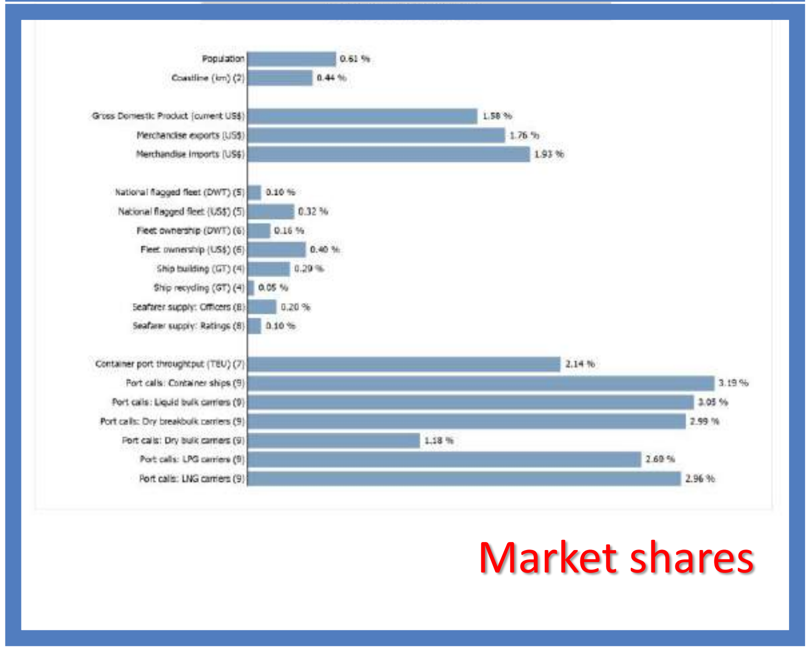
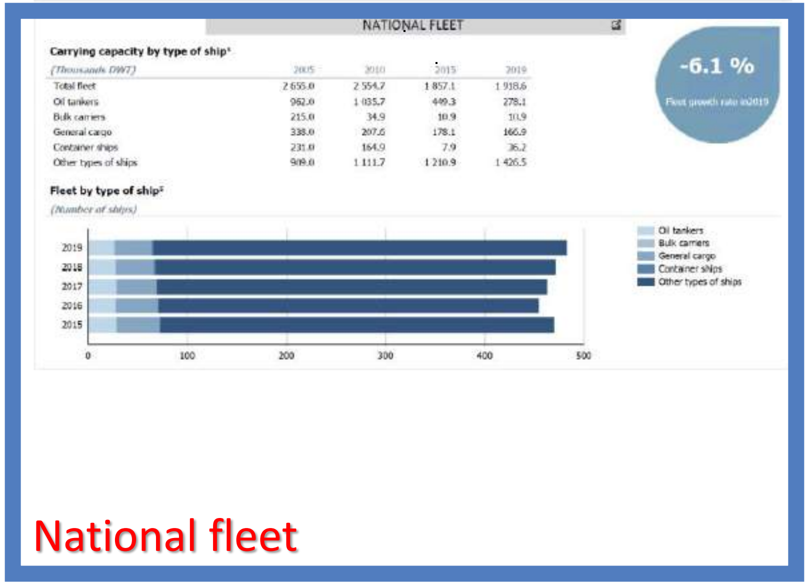
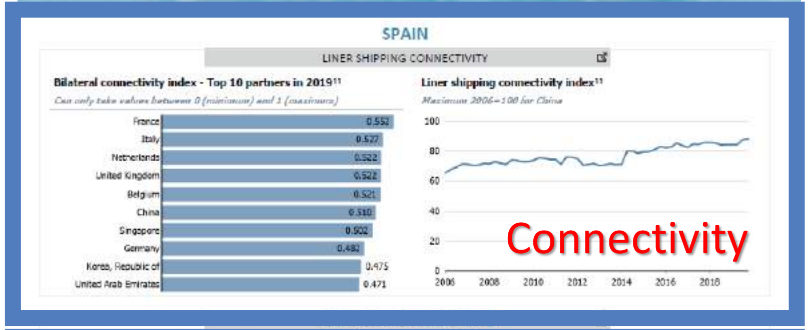
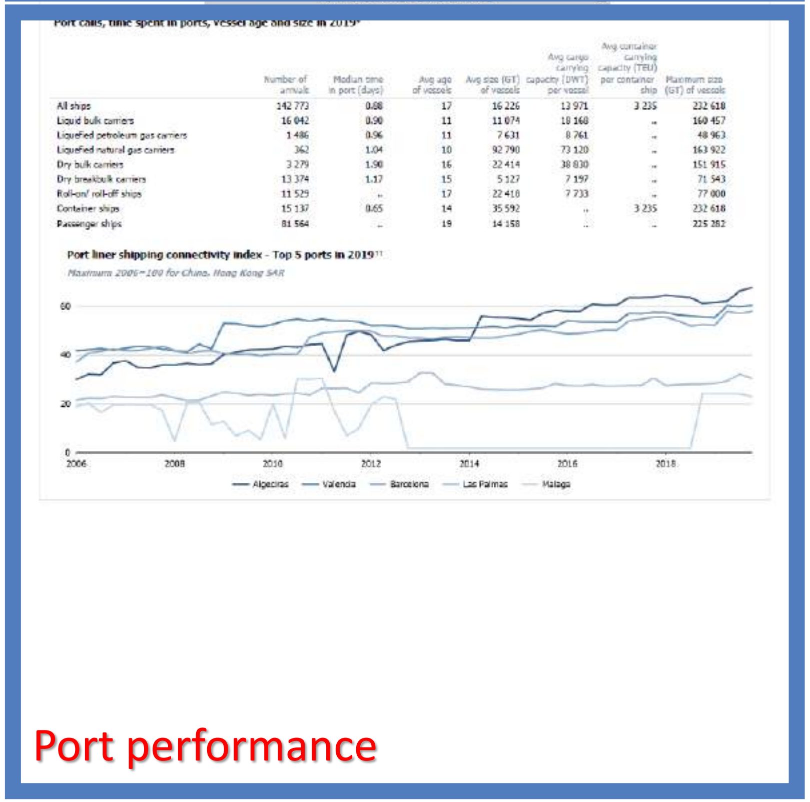
230 Maritime Country Profiles







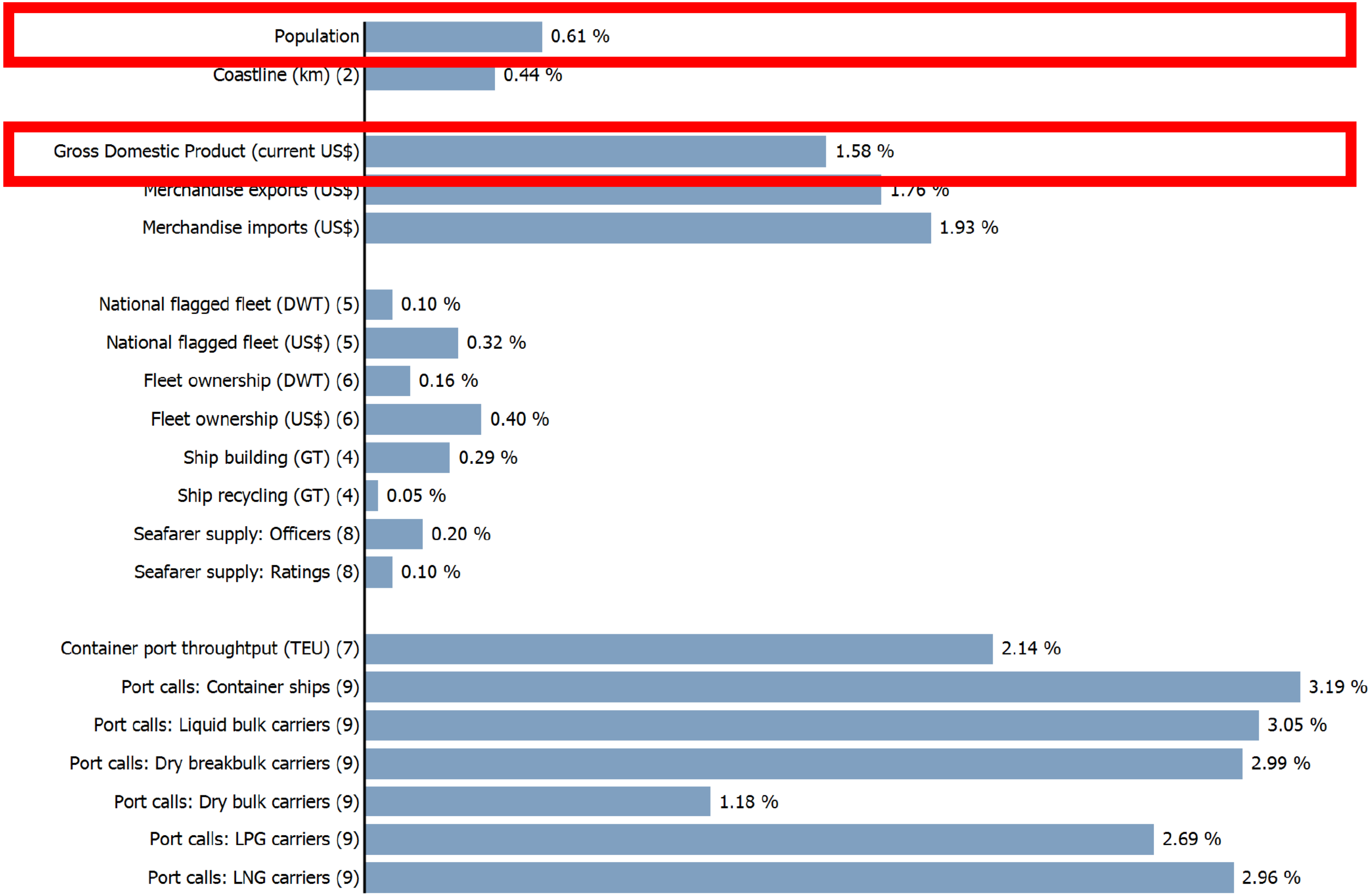




Http://stats.unctad.org/maritime

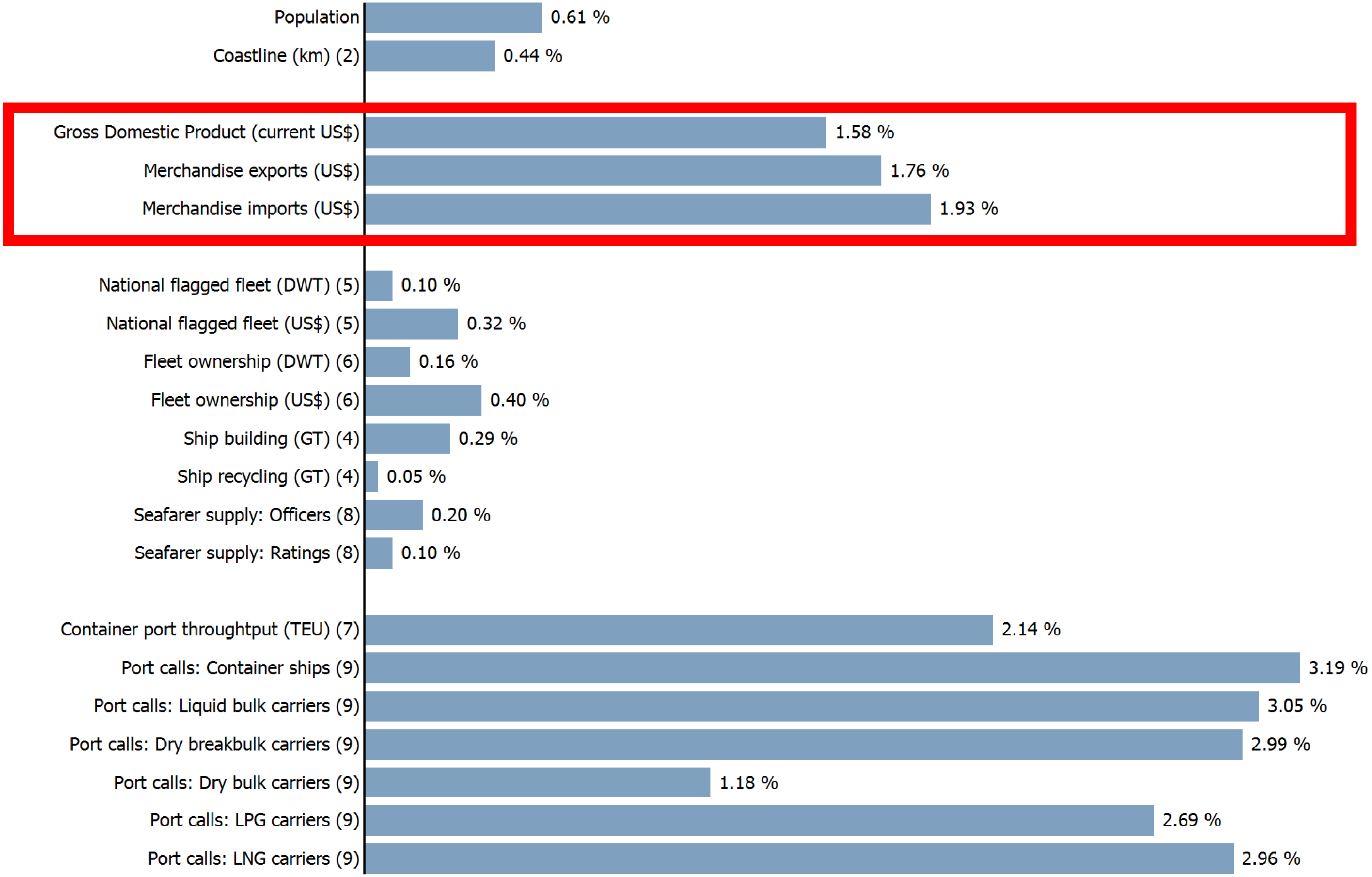
WORLD SHARES FOR 2019

Spain



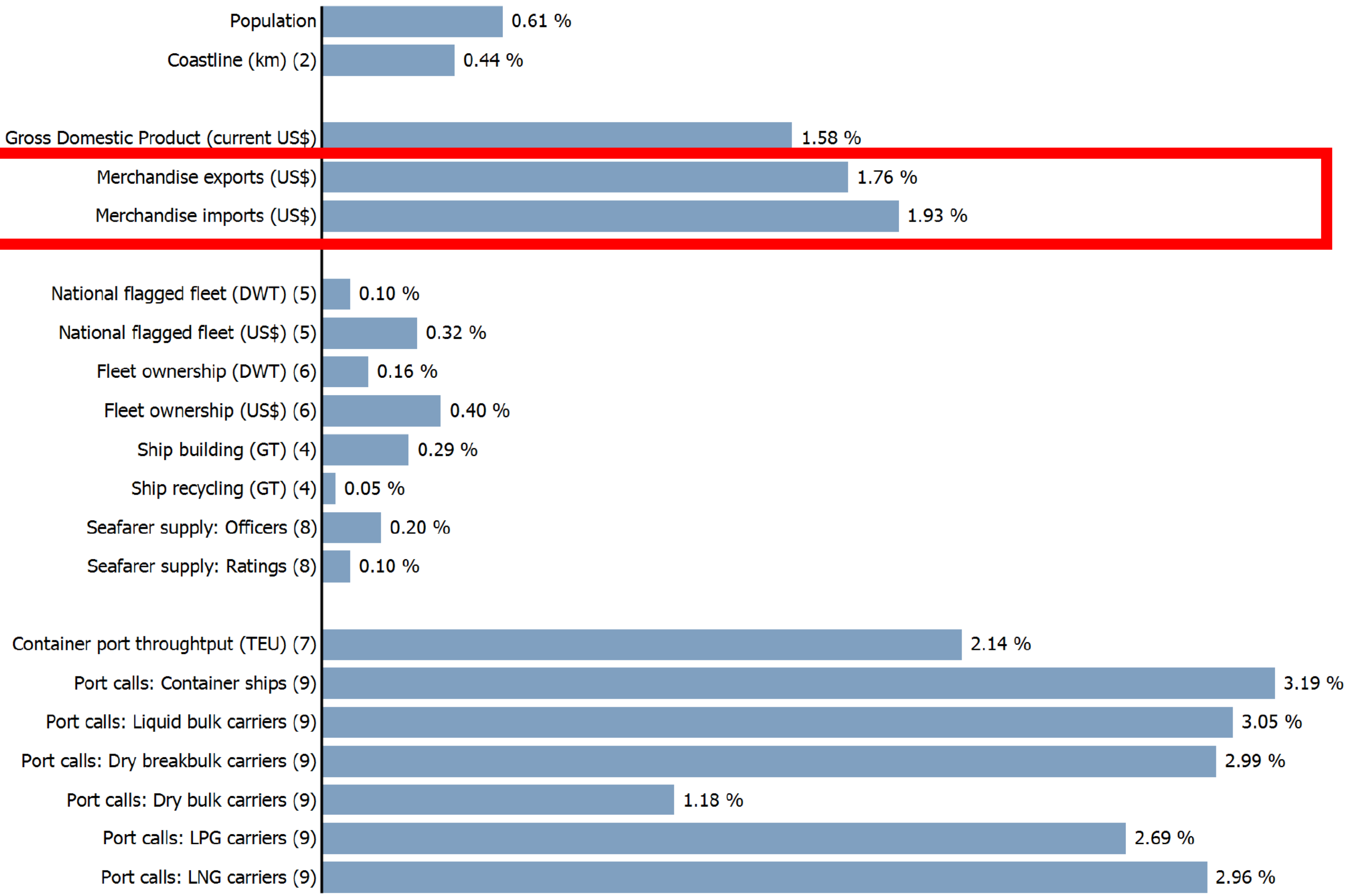
WORLD SHARES FOR 2019

Spain



WORLD SHARES FOR 2019

Spain



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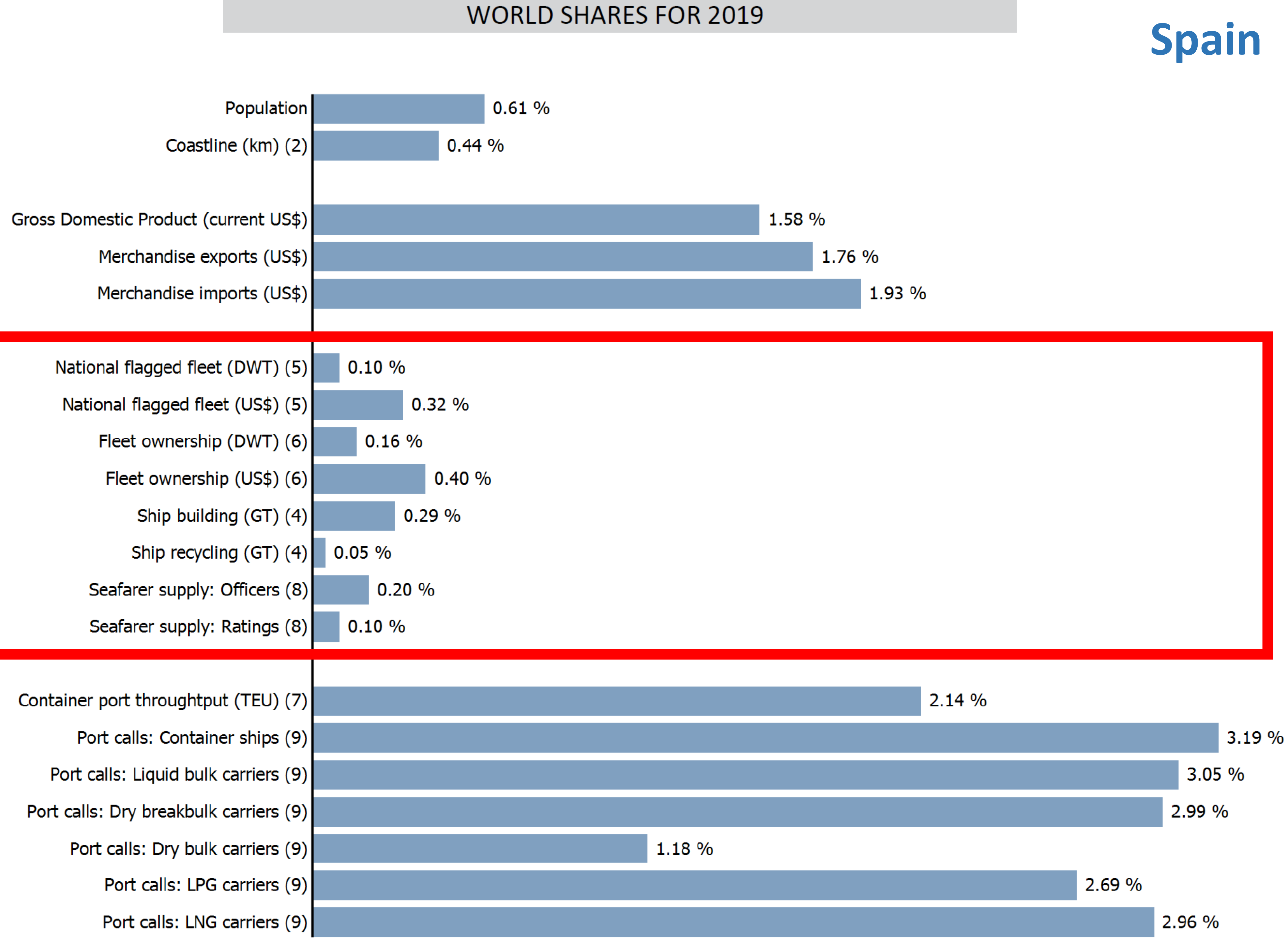
Spain



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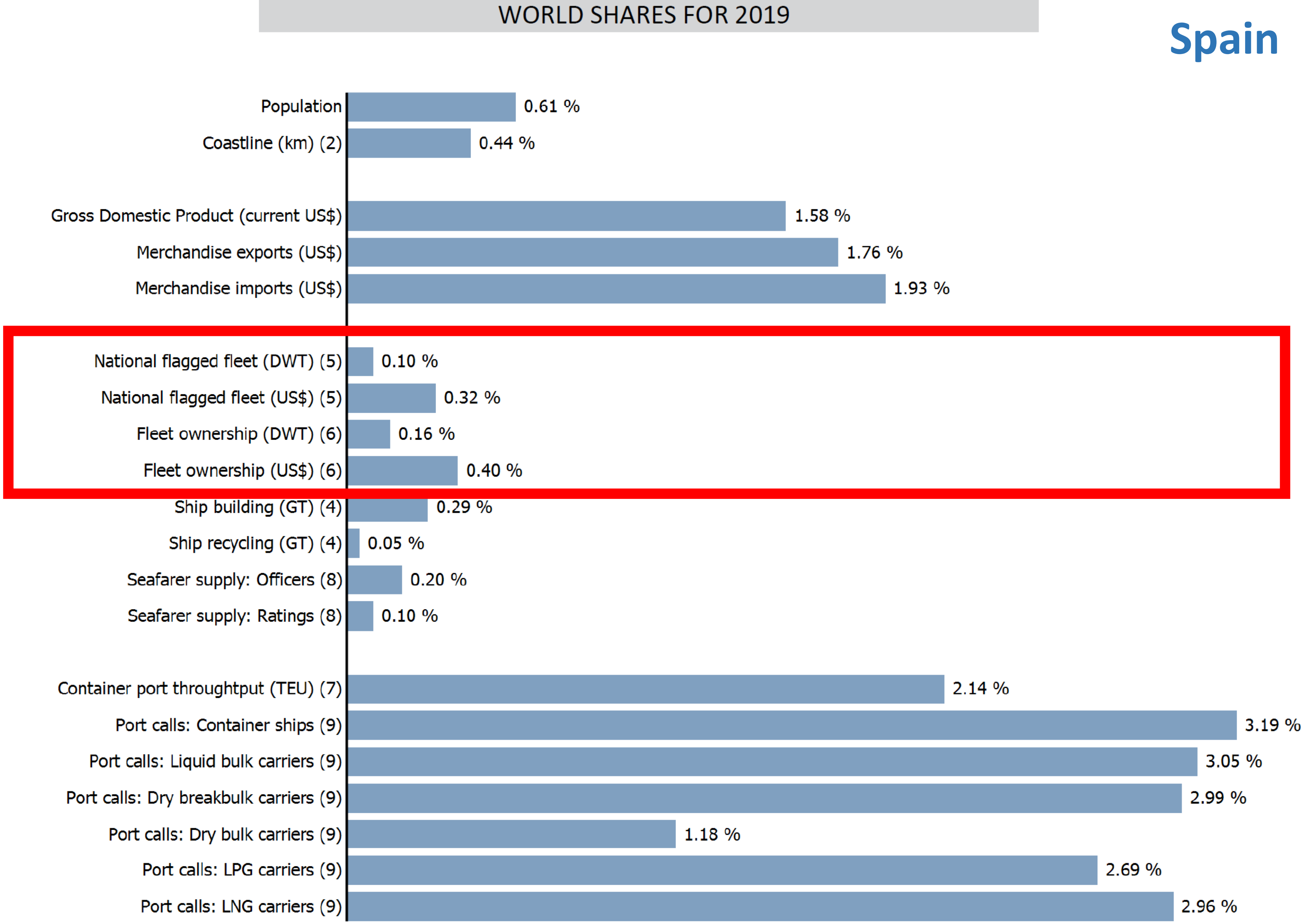
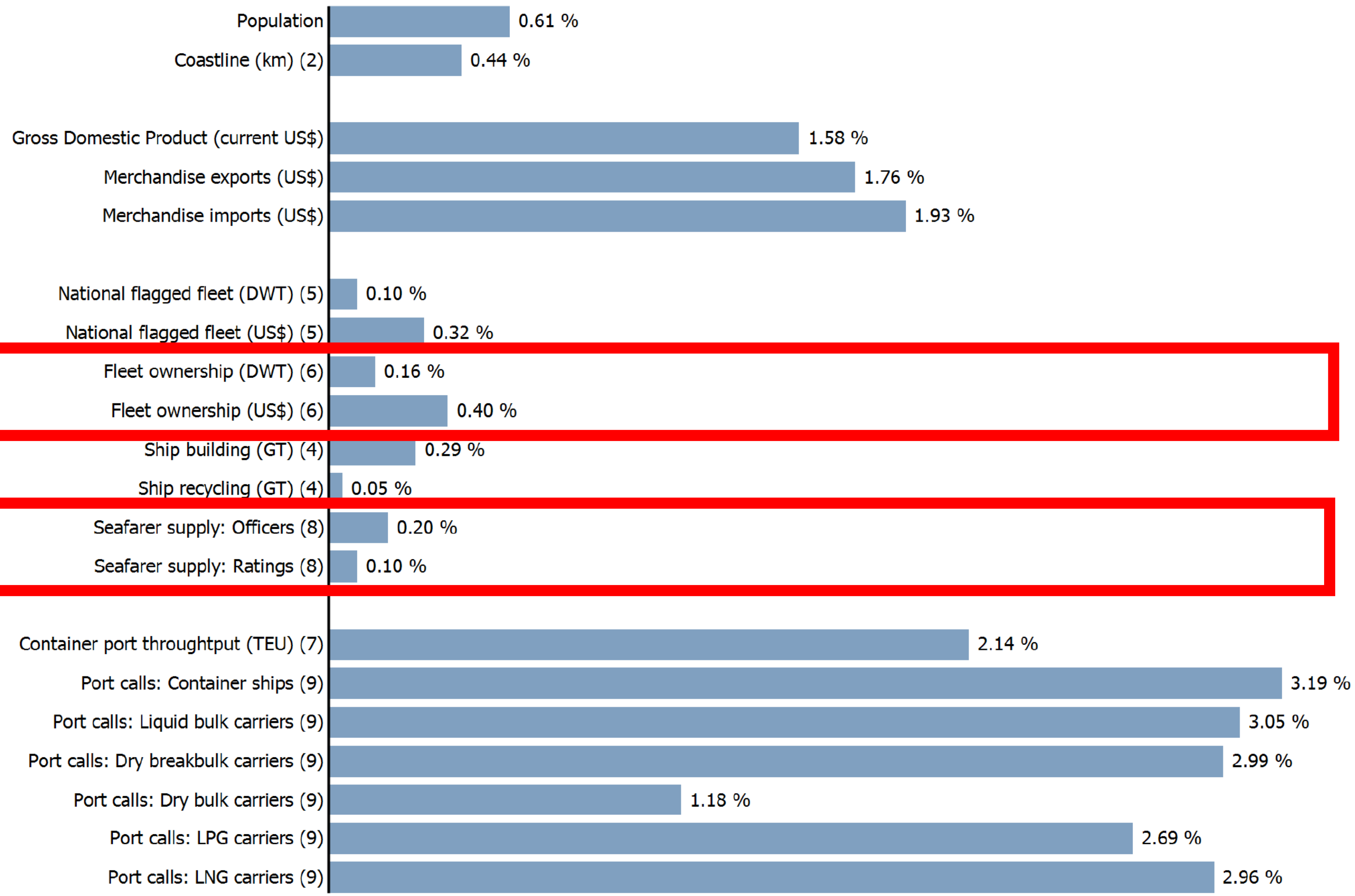

WORLD SHARES FOR 2019
Population 0.61 %
Coastline (km) (2) 0.44 %
Gross Domestic Product (current US$) 1.58 %
Merchandise exports (US$) 1.76 %
Merchandise imports (US$) 1.93 %
National flagged fleet (DWT) (5) 0.10 %
National flagged fleet (US$) (5) 0.32 %
Fleet ownership (DWT) (6) 0.16 %
Fleet ownership (US$) (6) 0.40 %
Ship building (GT) (4) 0.29 %
Ship recycling (GT) (4) 0.05 %
Seafarer supply: Officers (8) 0.20 %
Seafarer supply: Ratings (8) 0.10 %
Container port throughtput (TEU) (7) 2.14 %
Port calls: Container ships (9) 3.19 %
Port calls: Liquid bulk carriers (9) 3.05 %
Port calls: Dry breakbulk carriers (9) 2.99 %
Port calls: Dry bulk carriers (9) 1.18 %
Port calls: LPG carriers (9) 2.69 %
Port calls: LNG carriers (9) 2.96 %

WORLD SHARES FOR 2019

Spain



WORLD SHARES FOR 2019

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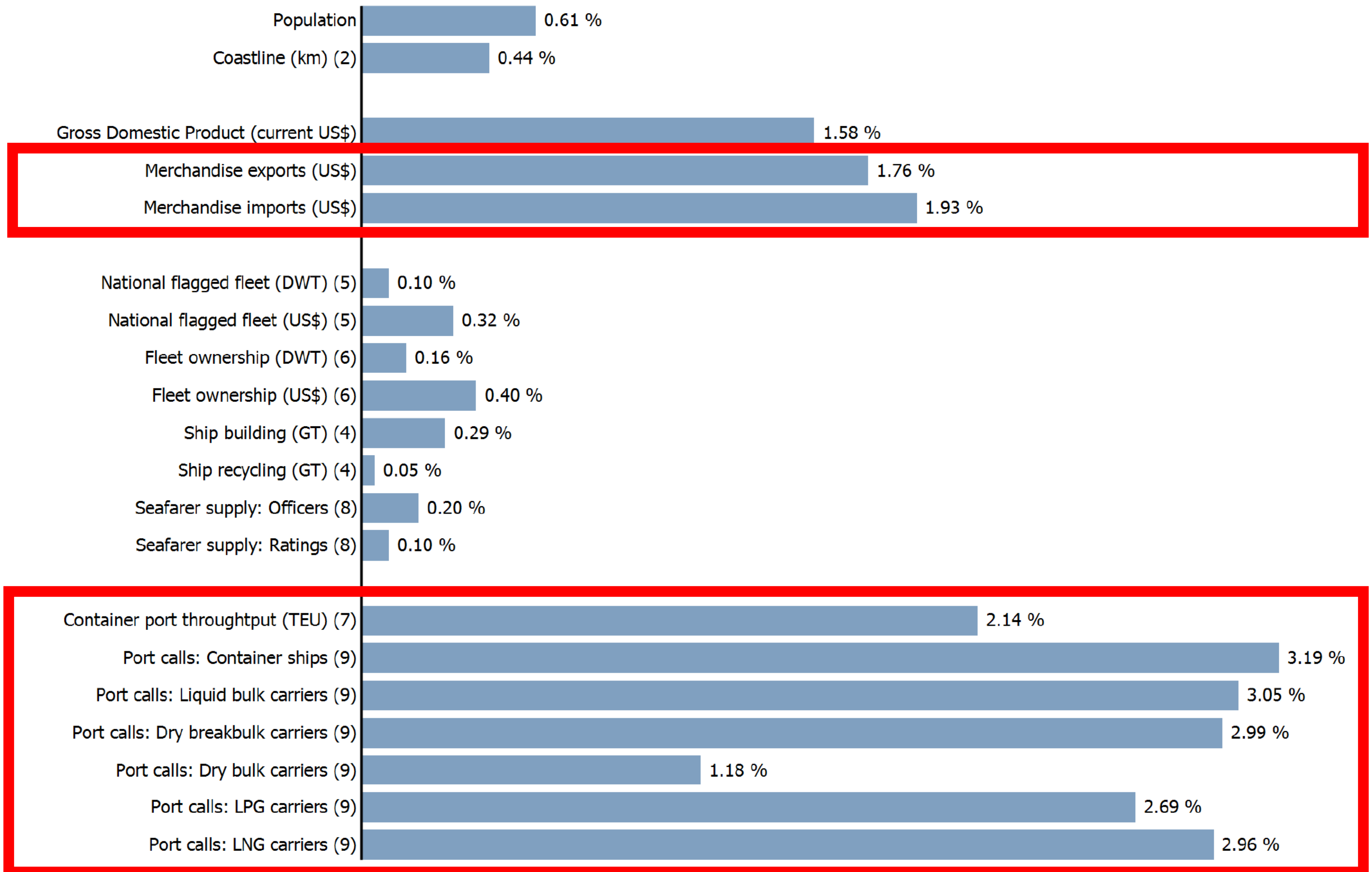
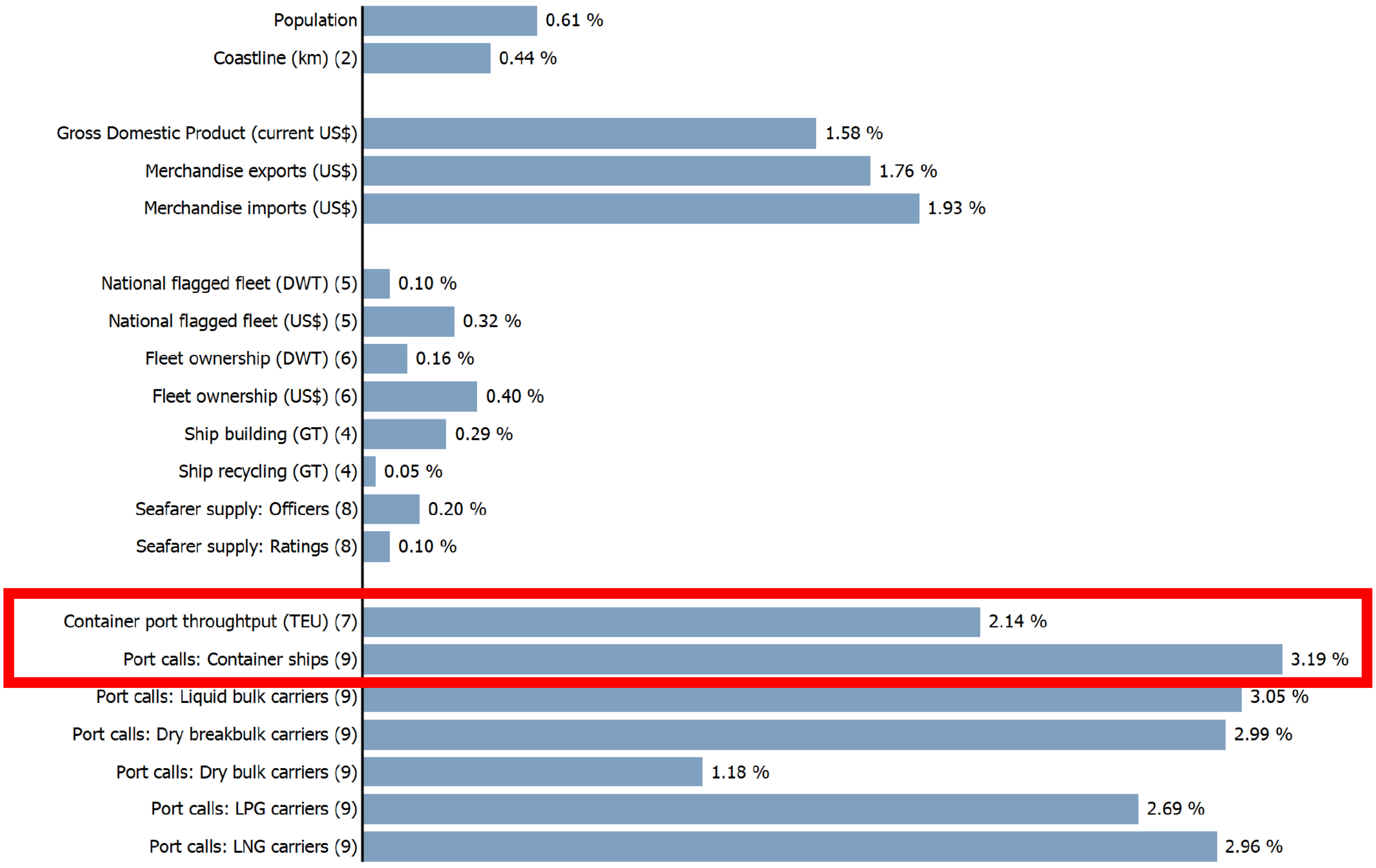


WORLD SHARES FOR 2019

Spain



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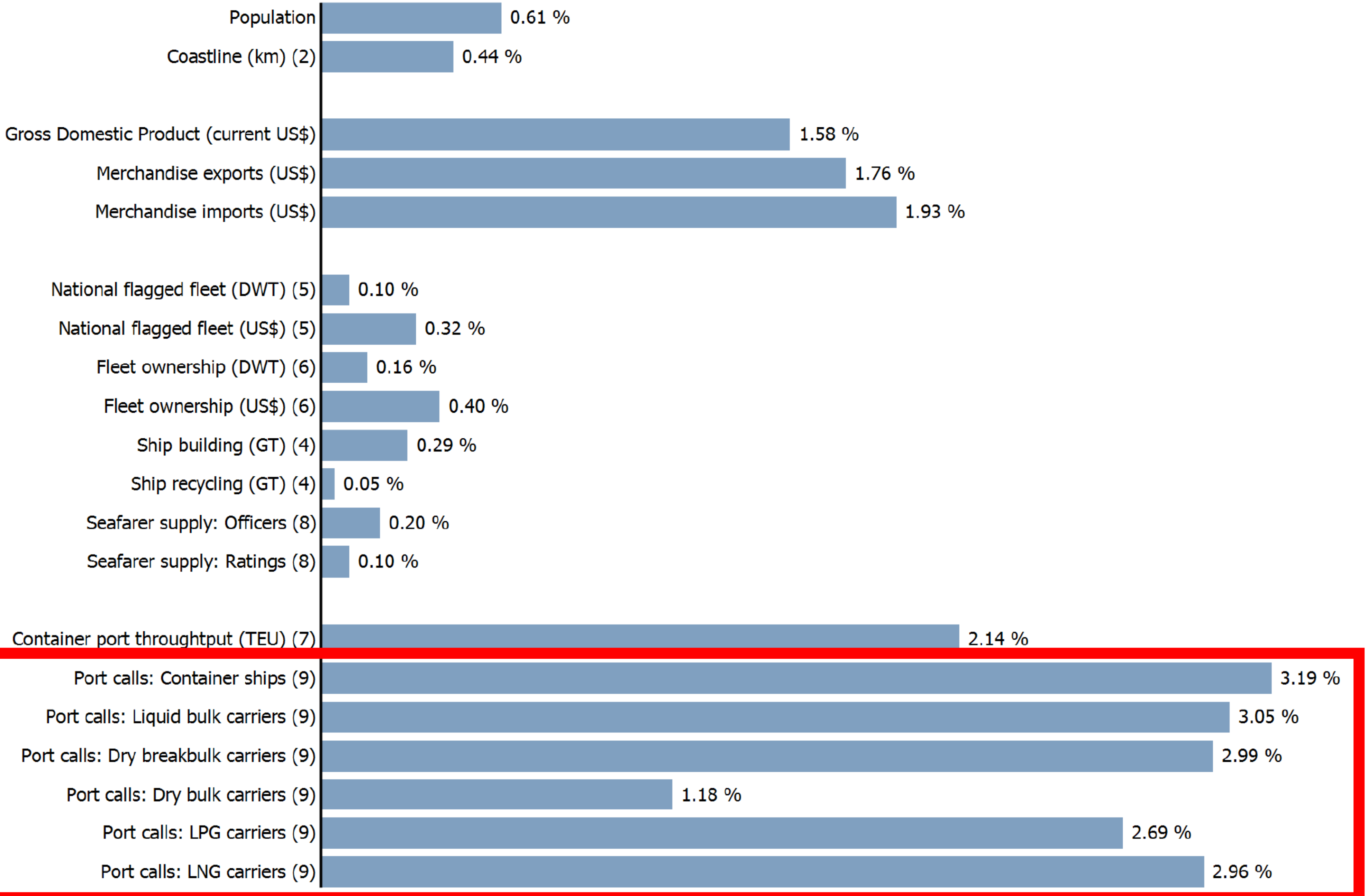
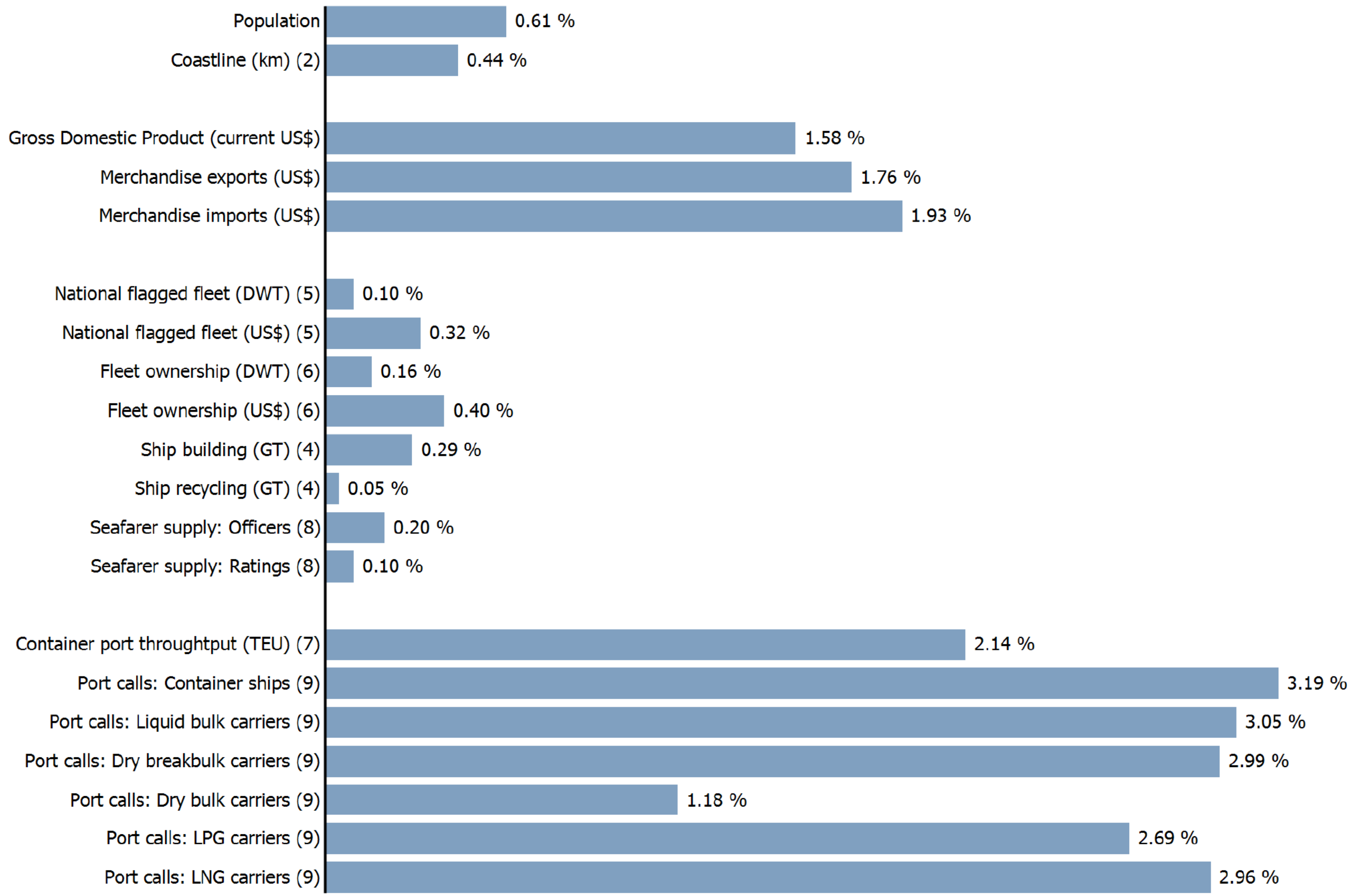
Spain



WORLD SHARES FOR 2019

Spain



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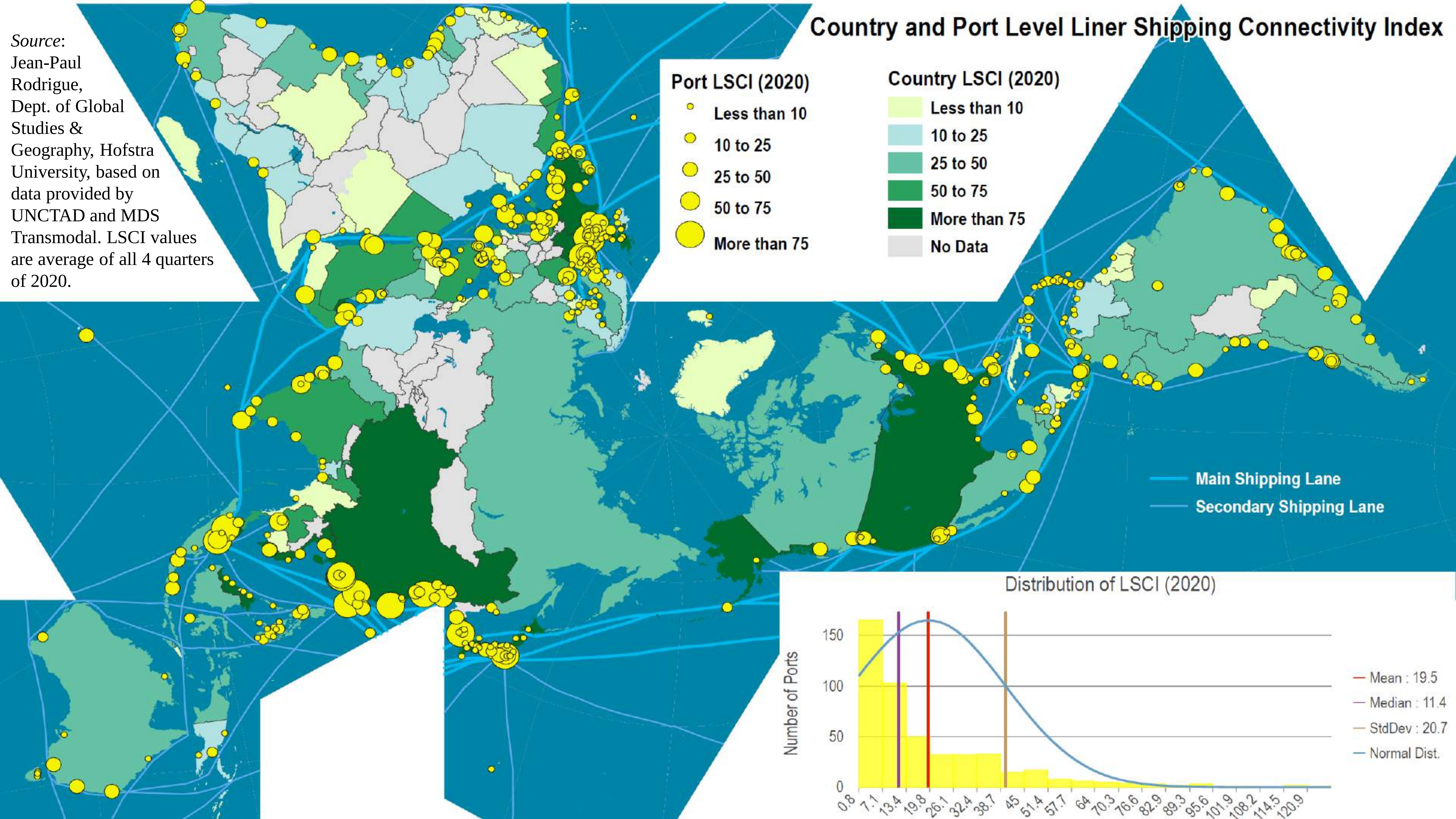
Source:
Jean-Paul Rodrigue, Dept. of Global Studies & Geography, Hofstra University, based on data provided by UNCTAD and MDS Transmodal. LSCI values are average of all 4 quarters of 2020.



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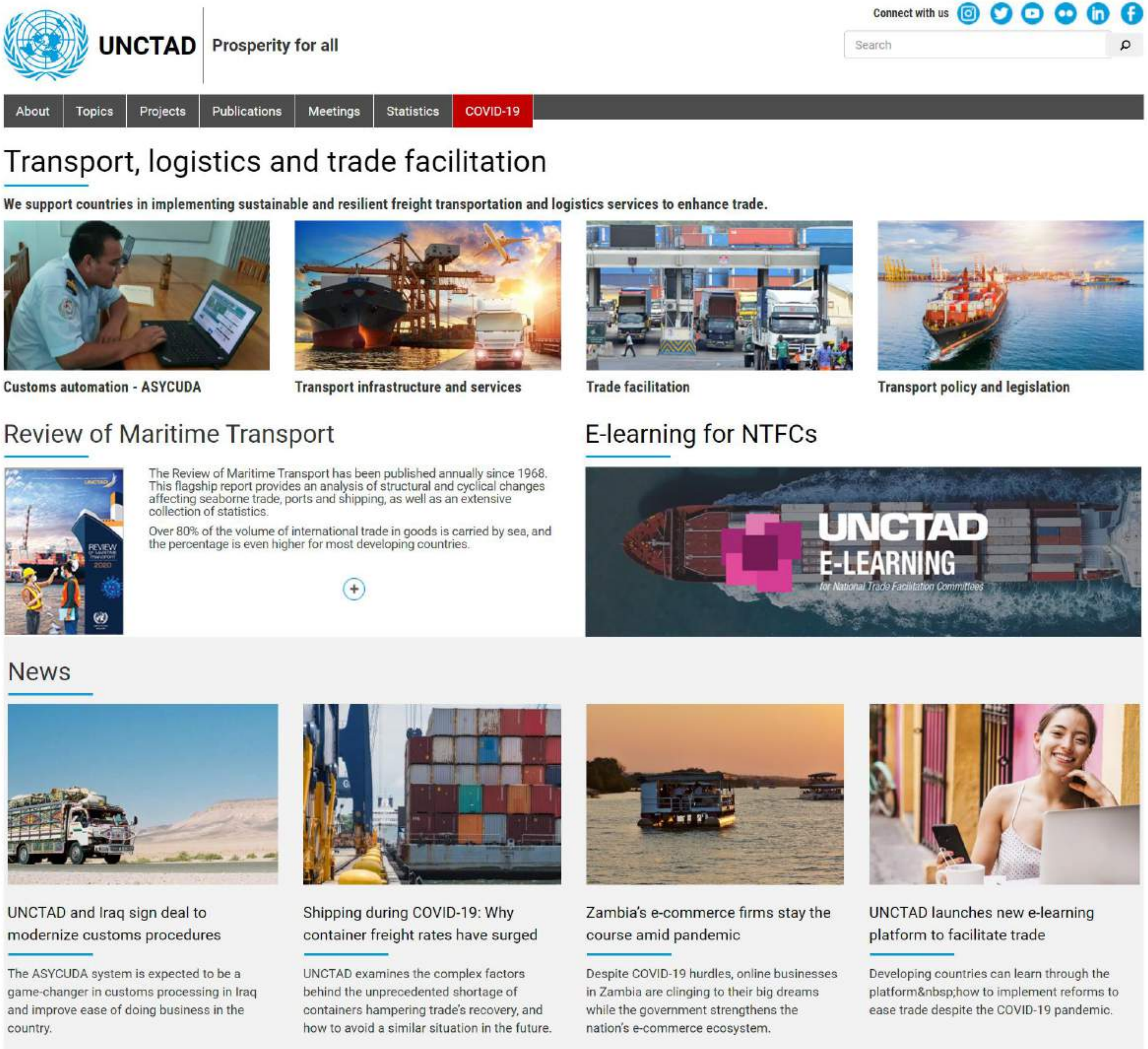
- Digital economy
- Creative economy
- Iron ore
- Maritime transport
- Transport costs
- Balance of payments
- Output and income
- Productive capacities
- Inflation and exchange rates
- Commodity prices
- Population

Name

- Merchant fleet by flag of registration and by type of ship, annual
- Share of the world merchant fleet value by flag of registration, annual
- Merchant fleet by country of beneficial ownership, annual
- Share of the world merchant fleet value by country of beneficial ownership, annual
- Ship recycling, by country, annual
- Ships built by country of building, annual
- Seafarer supply, quinquennial, 2015
- Liner shipping connectivity index, quarterly
- Liner shipping bilateral connectivity index, annual
- Container port throughput, annual
- Port liner shipping connectivity index, quarterly
- Port call and performance statistics: time spent in ports, vessel age and size, annual
- Port call and performance statistics: time spent in ports, vessel age and size, semi-annual
- Port call and performance statistics: number of port calls, annual
- Port call and performance statistics: number of port calls, semi-annual
- World seaborne trade by types of cargo and by group of economies, annual
- Bulk download (7-Zip)



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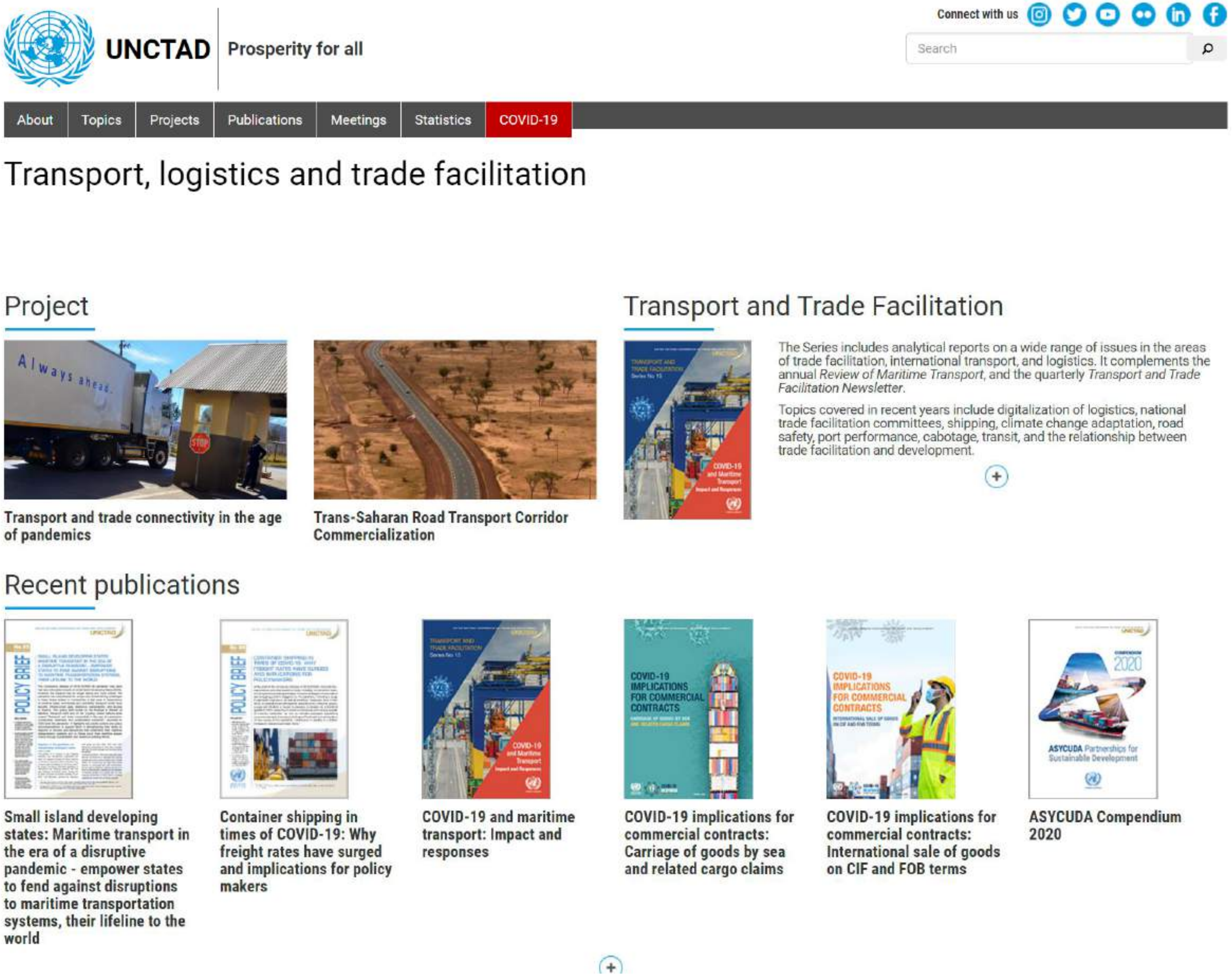

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e-Handbook of Statistics

The UNCTAD e-Handbook of Statistics presents a summary of world seaborne trade, merchant fleet statistics and other maritime transport indicators.

Statistics

World seaborne trade | World merchant fleet | Maritime transport indicators | Maritime transport country profiles

Events and meetings

Webinar on trade facilitation and e-business standards and recommendations by UN/CEFACT for members of the Cambodia's national trade facilitation committee
19 Aug 2021
Online, Cambodia

Webinar on trade facilitation and e-business standards and recommendations by UN/CEFACT for members of the Madagascar's national trade facilitation committee
18 Aug 2021
Online, Madagascar

Webinar on technical barriers to trade and sanitary and phytosanitary measures in the context of trade facilitation for members of the Cambodia's national trade facilitation committee
5 Aug 2021
Online, Cambodia

Webinar on technical barriers to trade and sanitary and phytosanitary measures in the context of trade facilitation for members of the Madagascar's national trade facilitation committee
4 Aug 2021
Online, Madagascar

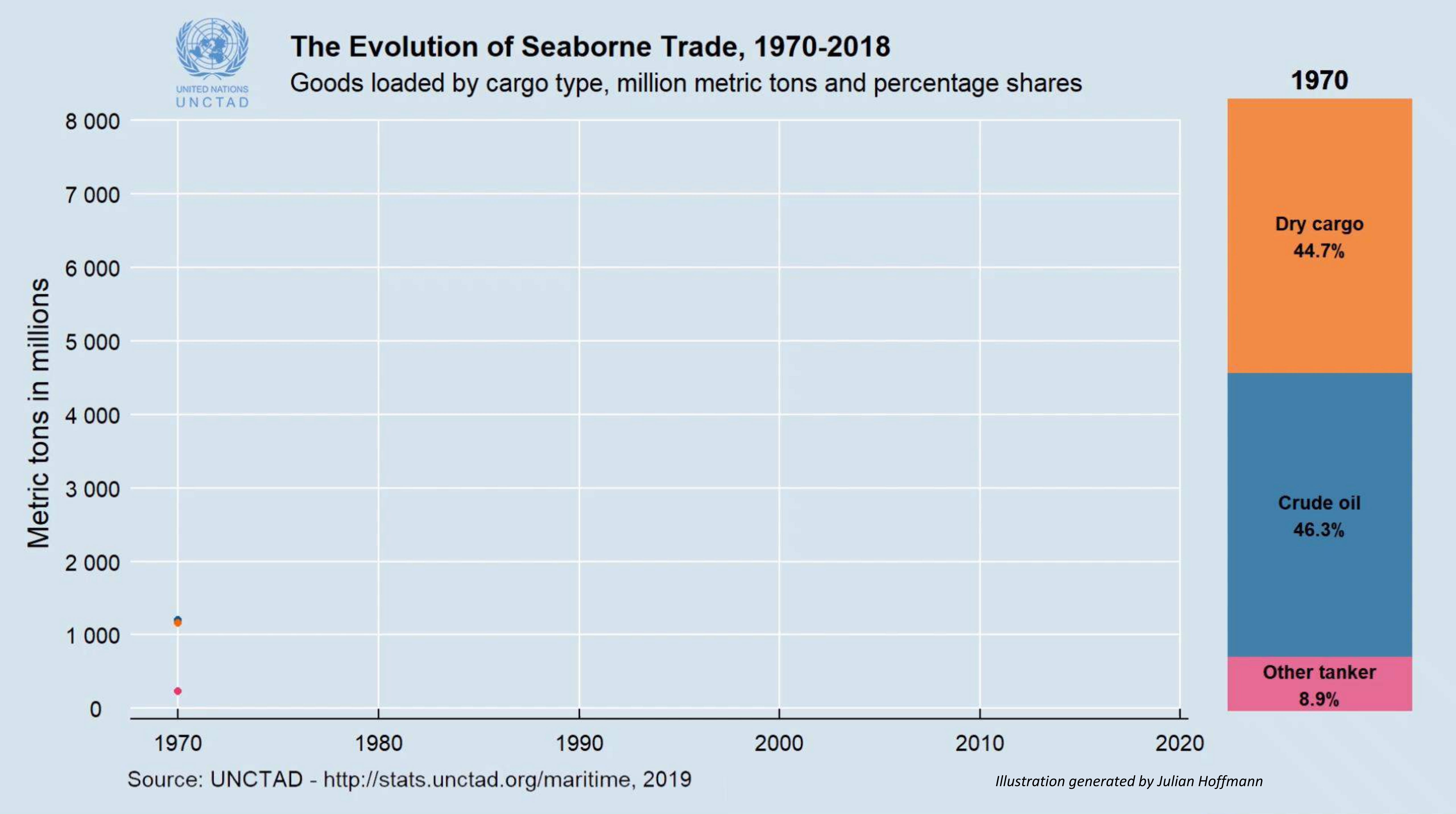
Documents and publications

Small island developing states: maritime transport in the era of a disruptive pandemic - empower states to fend against disruptions to maritime transportation systems, their lifeline to the world
Policy Brief No. 85
UNCTAD/PRESS/PB/2021/3 - 03 May 2021
English

Container shipping in times of COVID-19: Why freight rates have surged and implications for policy makers
Policy Brief No. 84
UNCTAD/PRESS/PB/2021/2 - 19 Apr 2021
English

COVID-19 and maritime transport: Impact and responses
UNCTAD/DTL/TLB/2021/1 - 23 Mar 2021
English

COVID-19 implications for commercial contracts: International sale of goods on CIF and FOB terms
UNCTAD/DTL/TLB/INF/2021/2 - 02 Mar 2021
English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The Evolution of Seaborne Trade, 1970-2018
Goods loaded by cargo type, million metric tons and percentage shares
1970
Dry cargo
44.7%
Crude oil
46.3%
Other tanker
8.9%
Metric tons in millions
8 000
7 000
6 000
5 000
4 000
3 000
2 000
1 000
0
1970
1980
1990
2000
2010
2020
Source: UNCTAD - http://stats.unctad.org/maritime, 2019
Illustration generated by Julian Hoffmann

40 Years of Merchant Fleets

Global fleet by type of ship, deadweight tonnage (dwt) from 1980 to 2019.

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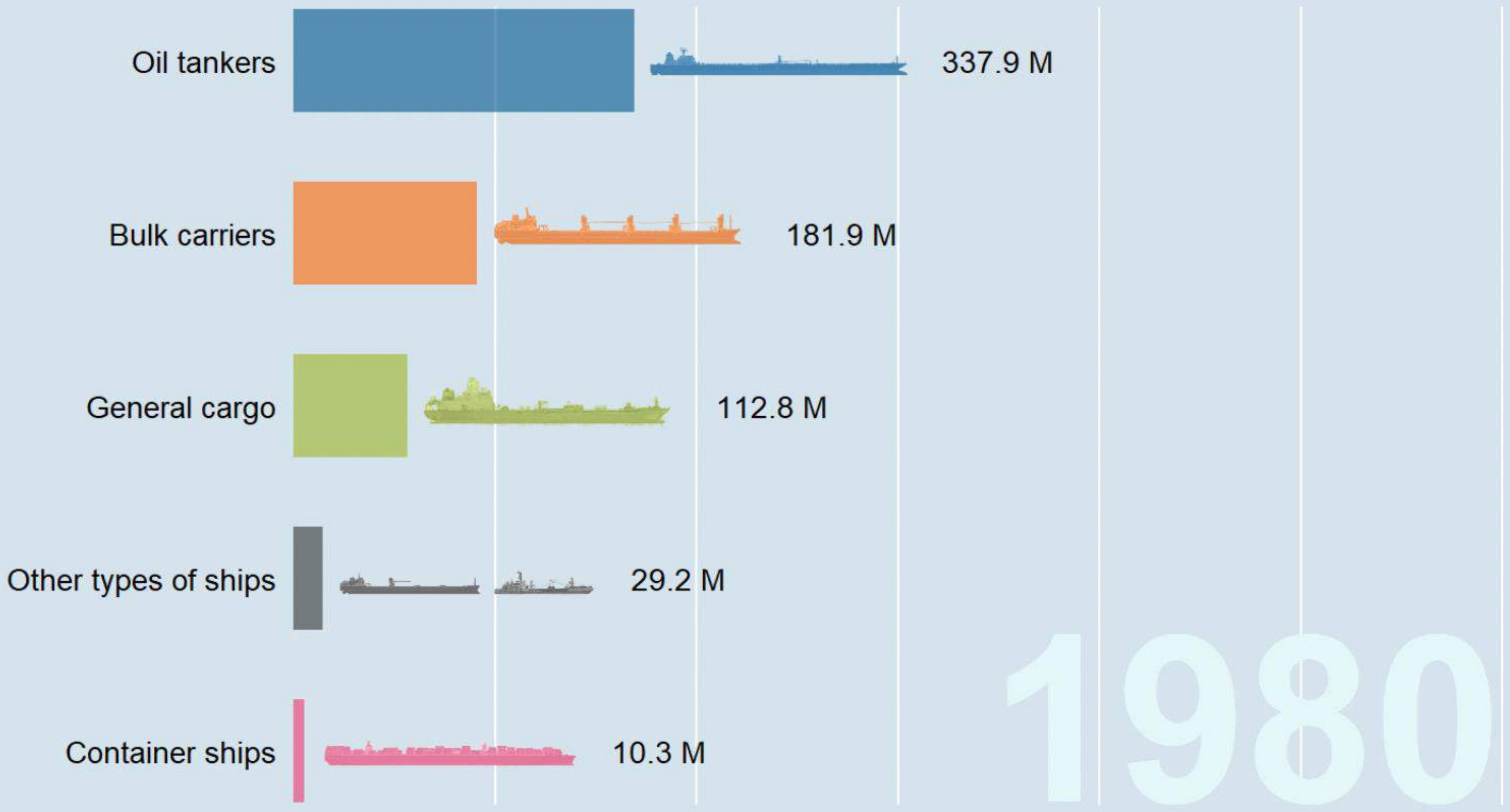
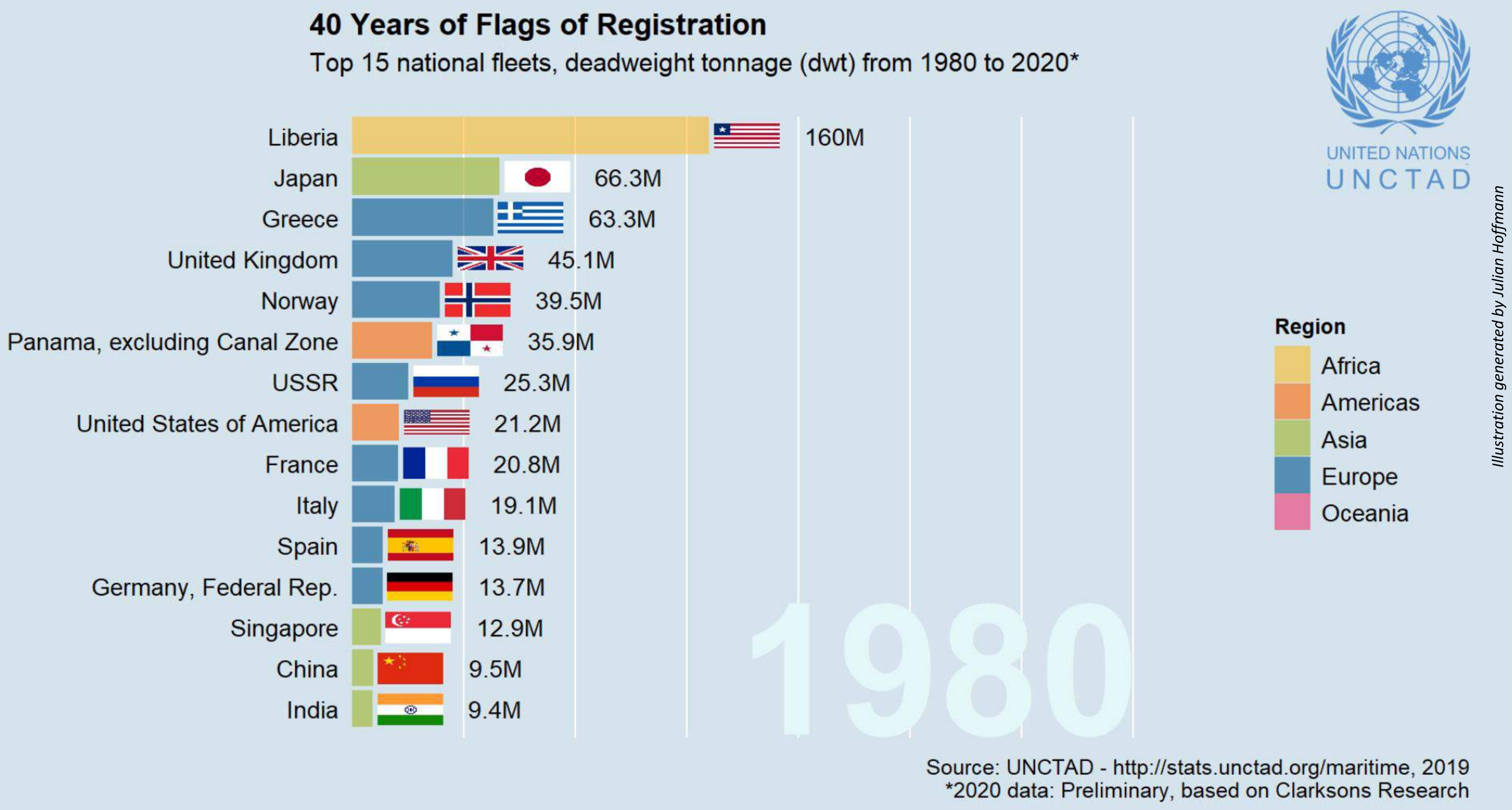


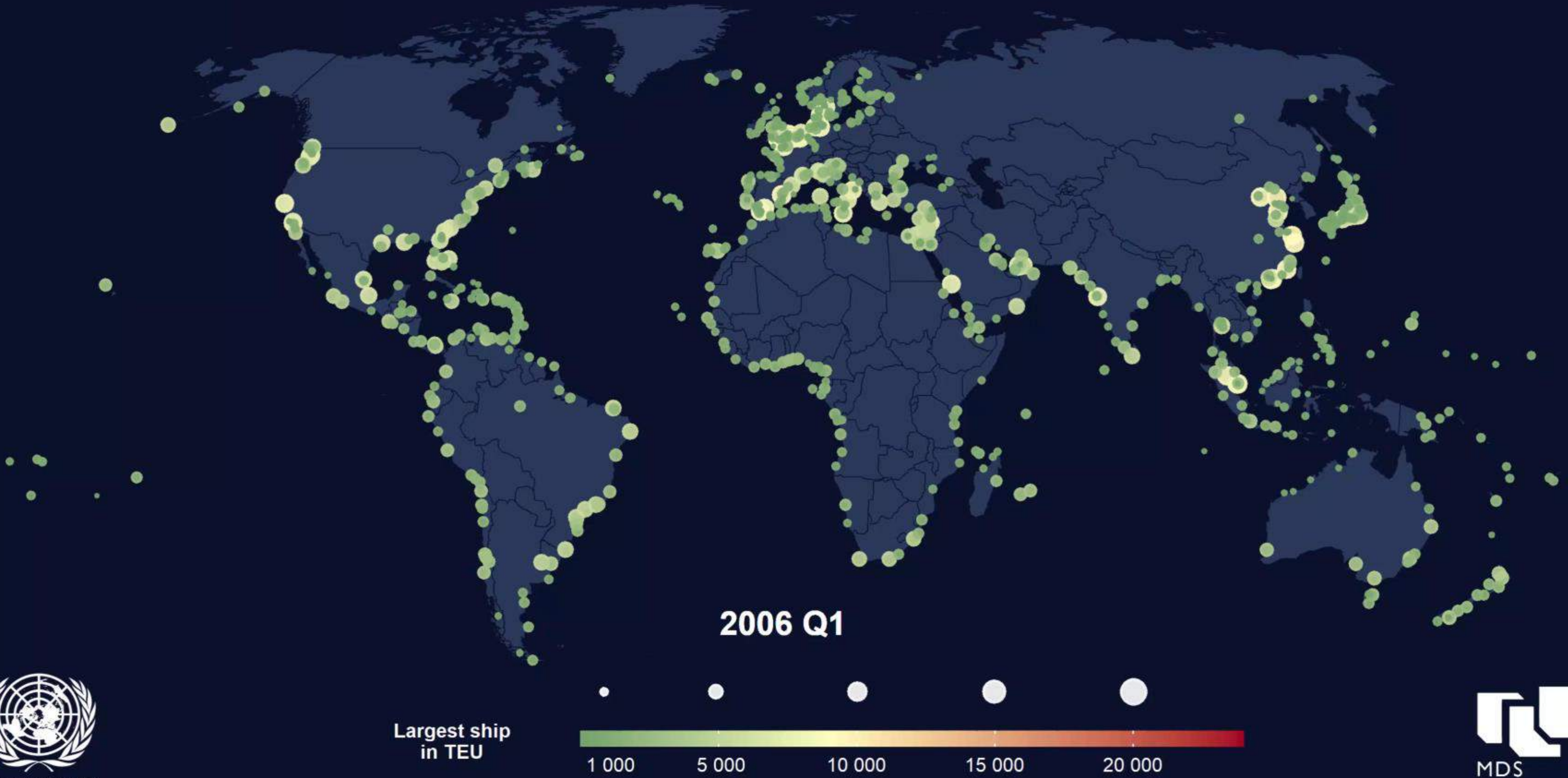
Source: UNCTAD - http://stats.unctad.org/maritime, 2019

Illustration generated by Julian Hoffmann


40 Years of Flags of Registration
Top 15 national fleets, deadweight tonnage (dwt) from 1980 to 2020*
Liberia 160M
Japan 66.3M
Greece 63.3M
United Kingdom 45.1M
Norway 39.5M
Panama, excluding Canal Zone 35.9M
USSR 25.3M
United States of America 21.2M
France 20.8M
Italy 19.1M
Spain 13.9M
Germany, Federal Rep. 13.7M
Singapore 12.9M
China 9.5M
India 9.4M
1980
UNITED NATIONS
UNCTAD
Region
Africa
Americas
Asia
Europe
Oceania
Illustration generated by Julian Hoffmann
Source: UNCTAD - http://stats.unctad.org/maritime, 2019
*2020 data: Preliminary, based on Clarksons Research

Where do the largest container ships call?

Size (TEU) of the largest ships deployed in each port. First quarter 2006 to fourth quarter 2020.



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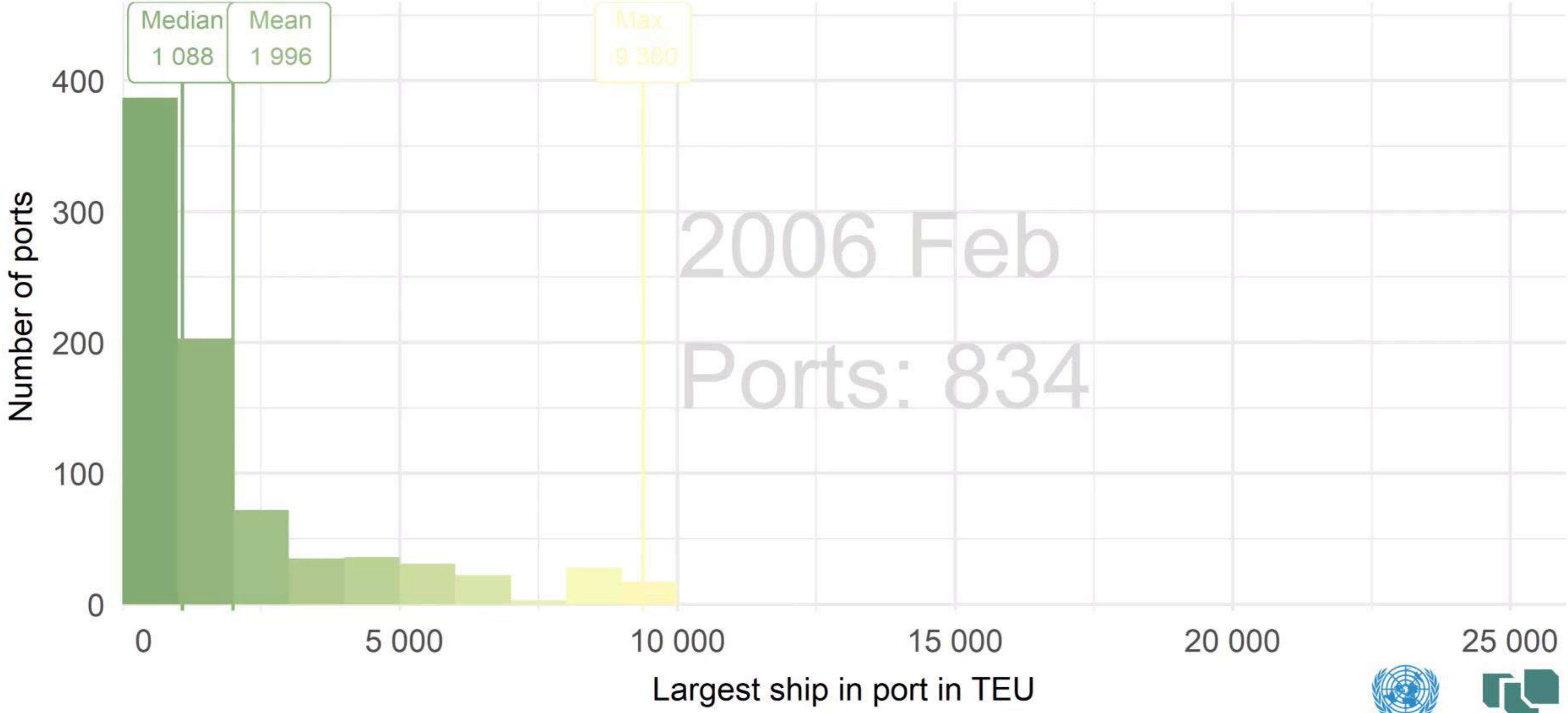
Source: UNCTAD based on MDS Transmodal, Containership Databank 2020 - visualized by Julian Hoffmann

MDS Transmodal

Distribution of ports by largest container ship deployment

Size (TEU) of the largest ships deployed in each port. First quarter 2006 to fourth quarter 2020.



Source: UNCTAD based on MDS Transmodal, Containership Databank 2020 - visualized by Julian Hoffmann

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MDS Transmodal

How many carriers do ports have?

Number of carriers in each port from first quarter 2006 to fourth quarter 2020.

Source: UNCTAD based on MDS Transmodal, Containership Databank 2020 - visualized by Julian Hoffmann

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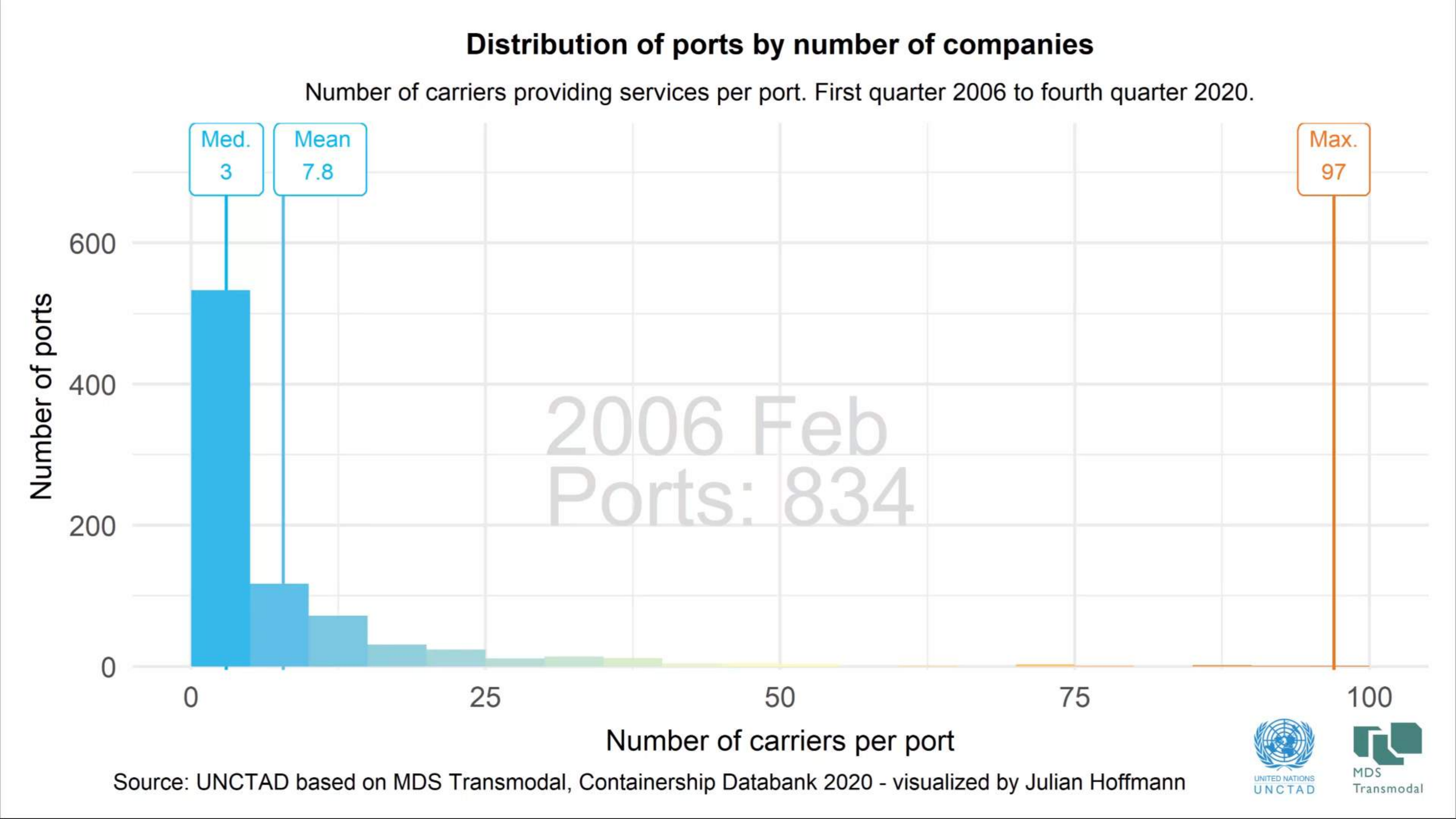
MDS
Transmodal


Distribution of ports by number of companies
Number of carriers providing services per port. First quarter 2006 to fourth quarter 2020.
Med.
3
Mean
7.8
Max.
97
2006 Feb
Ports: 834
600
400
200
0
Number of ports
0
25
50
75
100
Number of carriers per port
Source: UNCTAD based on MDS Transmodal, Containership Databank 2020 - visualized by Julian Hoffmann
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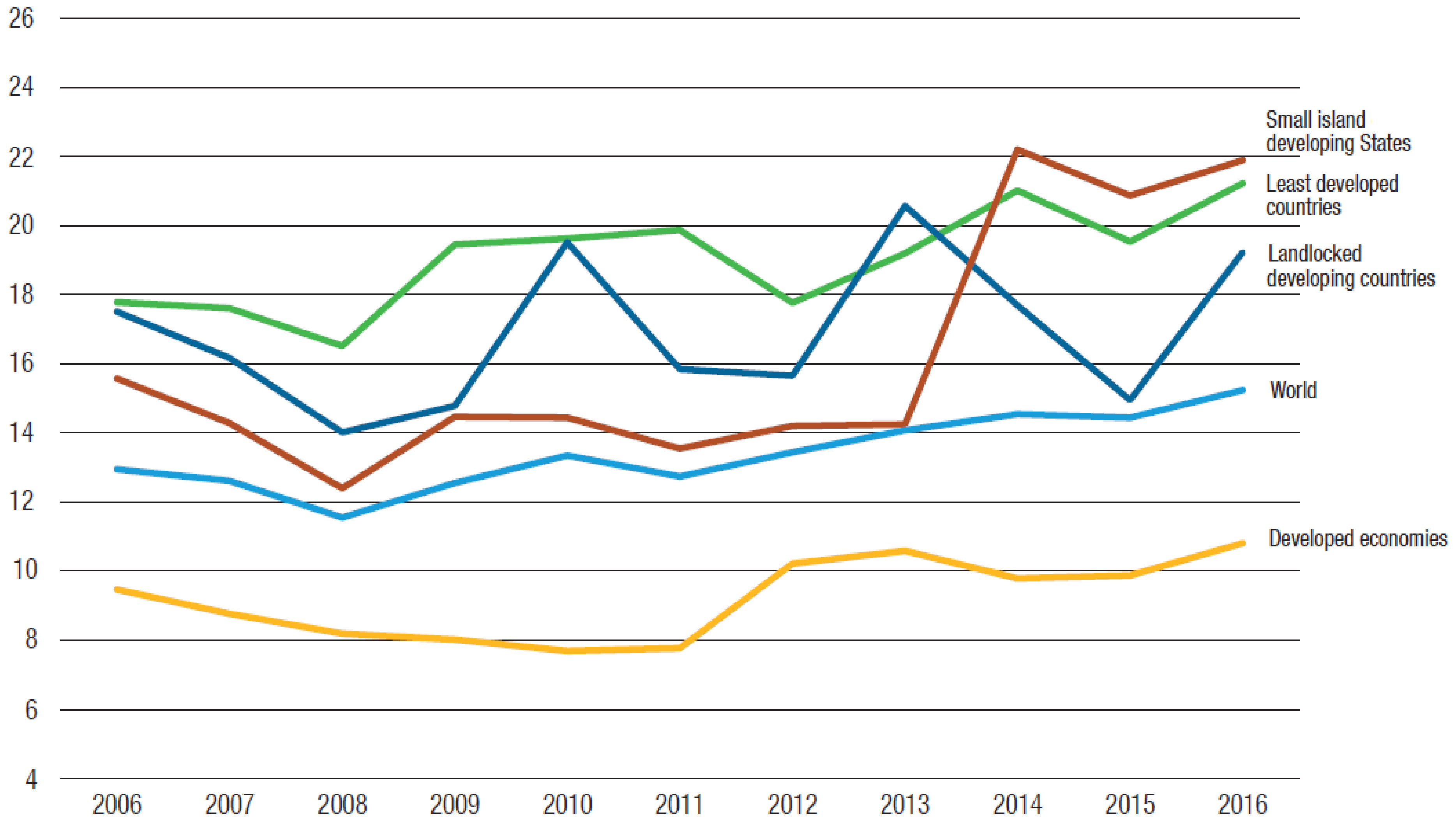
Transmodal

Figure 3.5. Transport and insurance costs of international trade, 2006–2016 (Percentage share of value of imports)



Source: UNCTAD secretariat calculations.

Note: All modes of transport; the least developed countries grouping includes 48 countries for all periods up to 2016.

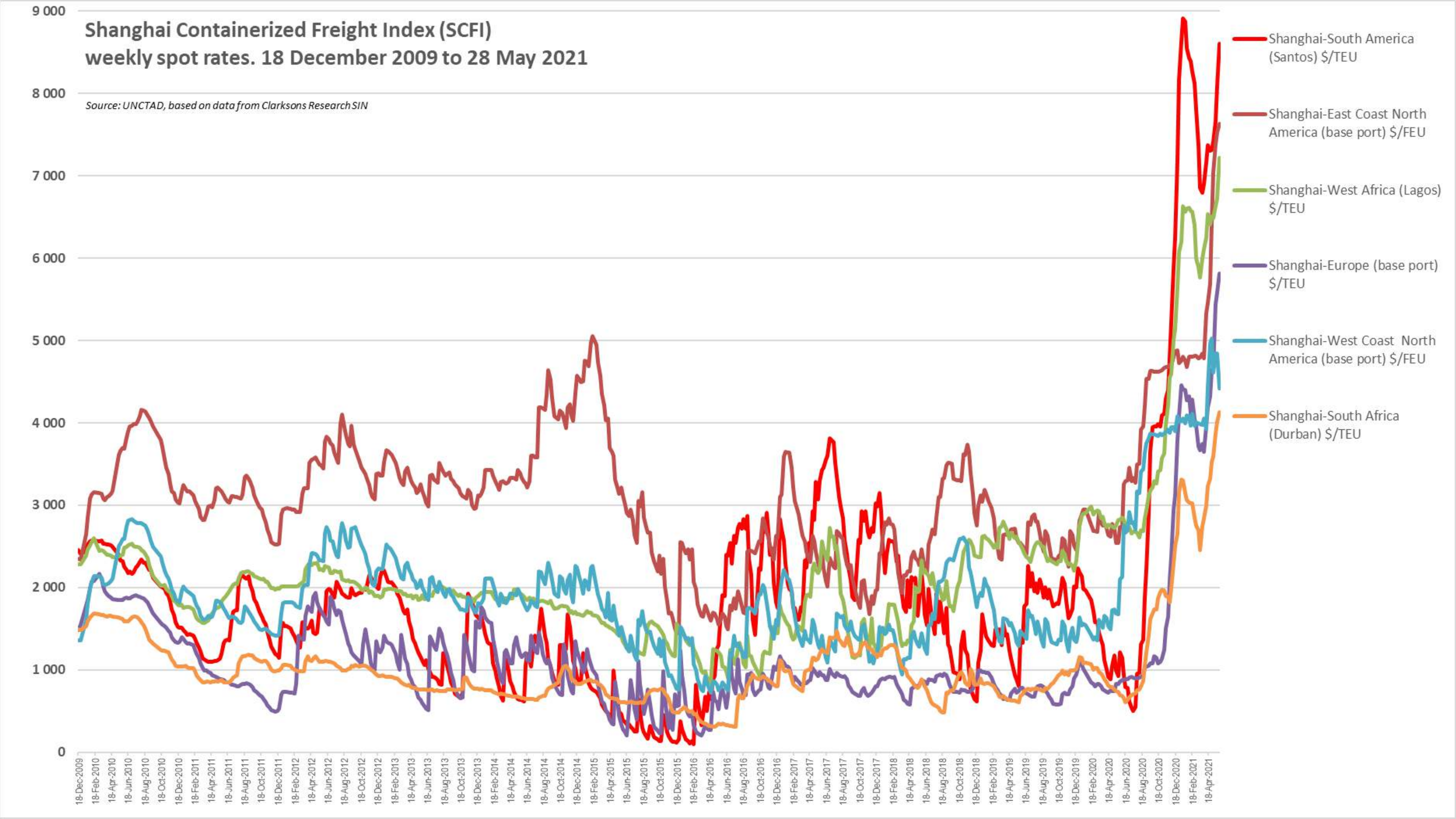
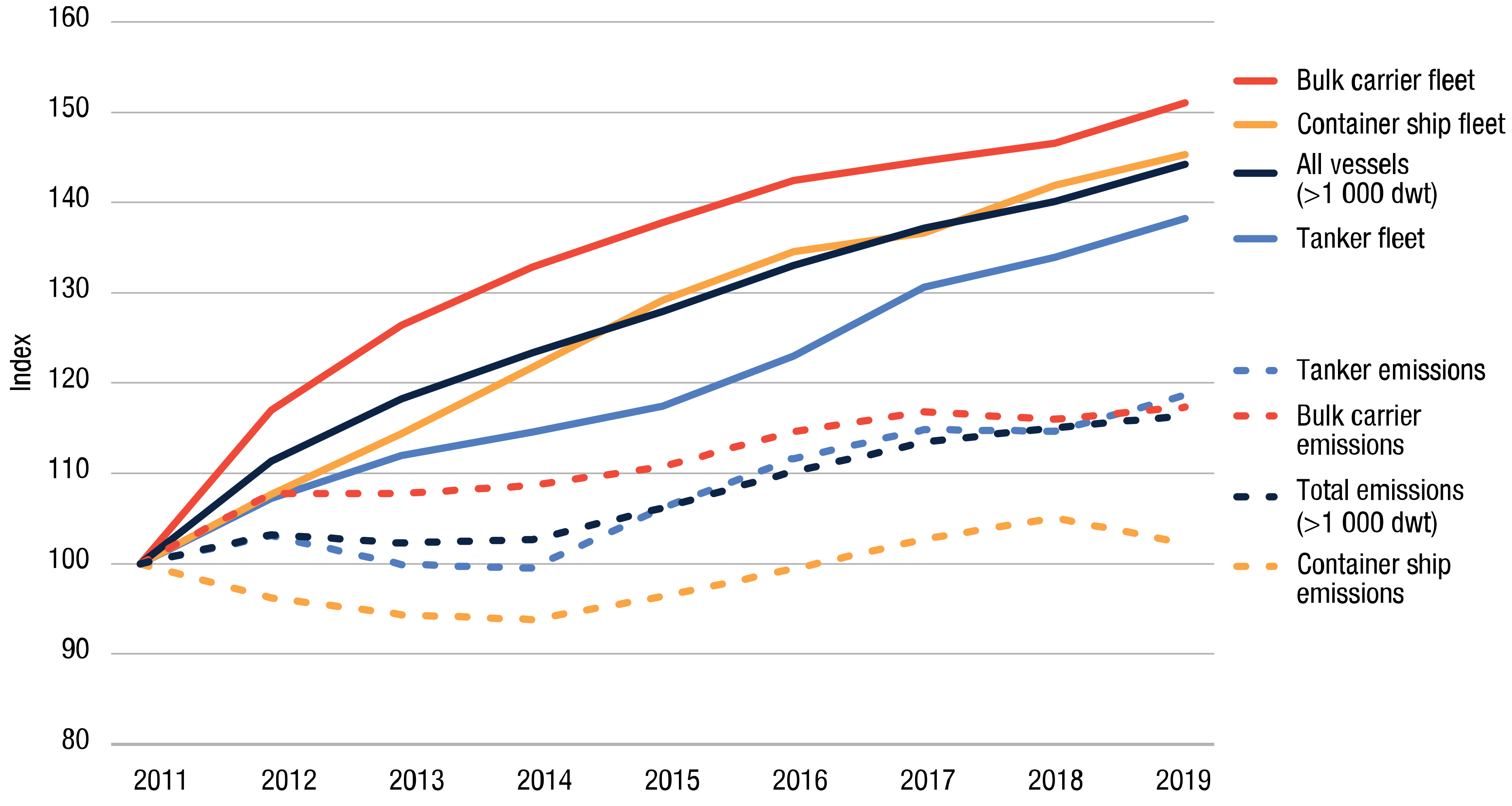
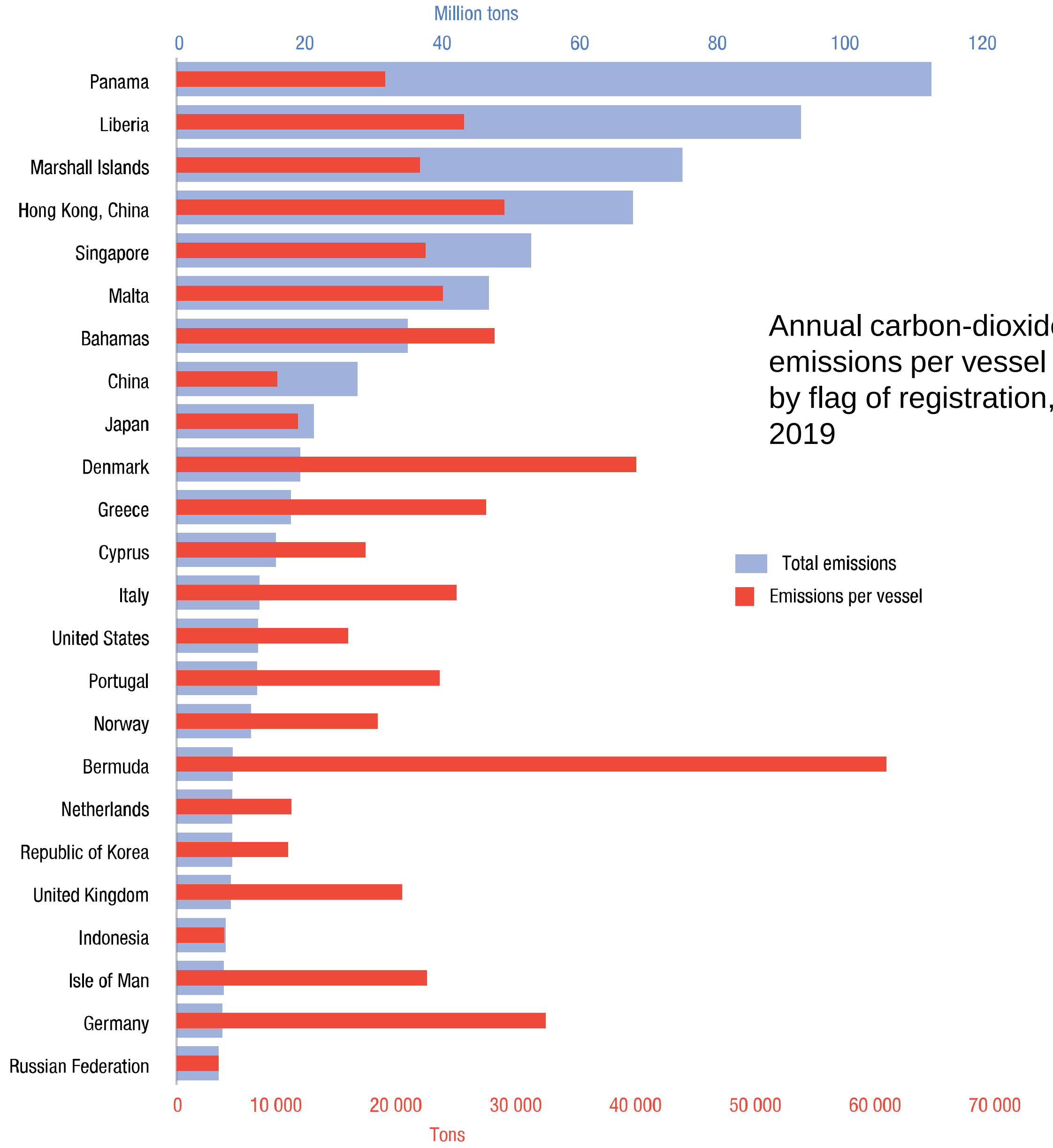

Shanghai Containerized Freight Index (SCFI)
weekly spot rates. 18 December 2009 to 28 May 2021
Source: UNCTAD, based on data from Clarksons Research SIN
9 000
8 000
7 000
6 000
5 000
4 000
3 000
2 000
1 000
0
Shanghai-South America (Santos) $/TEU
Shanghai-East Coast North America (base port) $/FEU
Shanghai-West Africa (Lagos) $/TEU
Shanghai-Europe (base port) $/TEU
Shanghai-West Coast North America (base port) $/FEU
Shanghai-South Africa (Durban) $/TEU

Figure 3.29 Comparison of dead-weight tonnage of respective fleet and carbon-dioxide emissions from bulk carriers, container ships and tankers, 2011–2019 (2011 = 100)



Source: UNCTAD, based on Marine Benchmark.
http://unctad.org/RMT

MARINE BENCHMARK



Annual carbon-dioxide emissions per vessel by flag of registration, 2019

Source: UNCTAD, based on Marine Benchmark.
http://unctad.org/RMT

MARINE BENCHMARK

UNITED NATIONS CONFERENCE ON TRADE AND DEVELOPMENT
UNCTAD

REVIEW OF MARITIME TRANSPORT 2020

UNITED NATIONS
UNCTAD

Seminarios Valenciaport:

Herramientas para analizar el mercado marítimo

2021 3 Junio

Indices y estadísticas de la UNCTAD

1. Pasado
2. Presente
3. Futuro

6 April 2021

UNCTAD/GDS/DSI/MISC/2021/3

GLOBAL MERCHANDISE AND SERVICES TRADE NOWCAST APRIL 2021

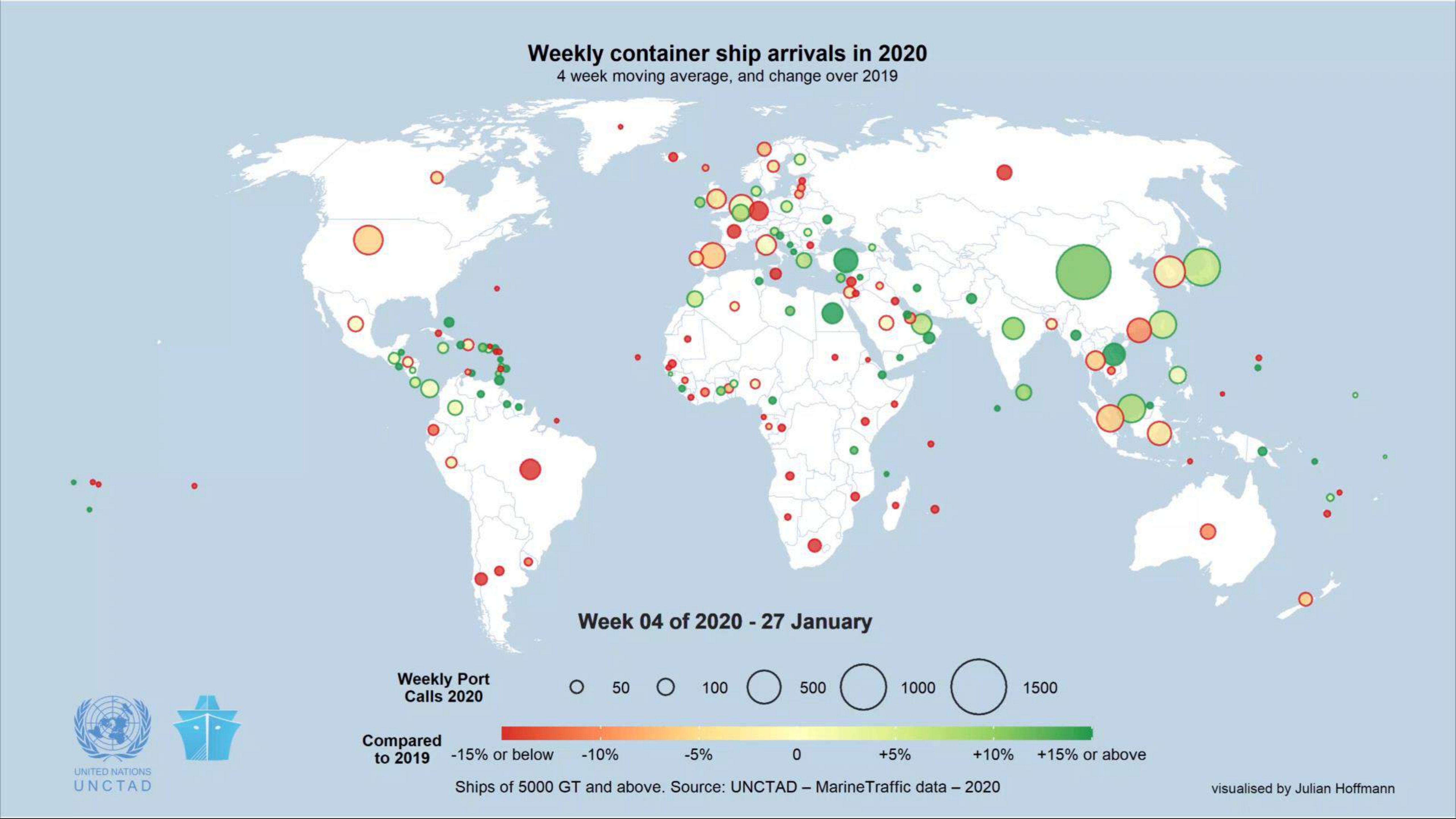
Nowcasts indicate continued recovery for global trade in the first quarter of 2021

After steep declines in global merchandise trade **values** and **volumes** and in global services trade in the first half of 2020, all three series experienced bounce backs in the third quarter of 2020. Due to the nature of the COVID-19 pandemic, services trade has been consistently hit harder than merchandise trade. The data indicate a reversal of this trend in the fourth quarter of 2020 and the first quarter of 2021, with services growth finally beginning to outpace growth in merchandise trade. All three series are nowcast to continue growing in the first quarter of 2021, at 2.1 per cent, 2.5 per cent, and 4.4 per cent quarter-over-quarter for merchandise values, volumes, and services, respectively. However, the deeper contraction experienced in services coupled with a much weaker third quarter recovery means services has much more ground to make up than merchandise trade.

Services trade Q1 2021 -7% YoY

Merchandise trade values +9% YoY

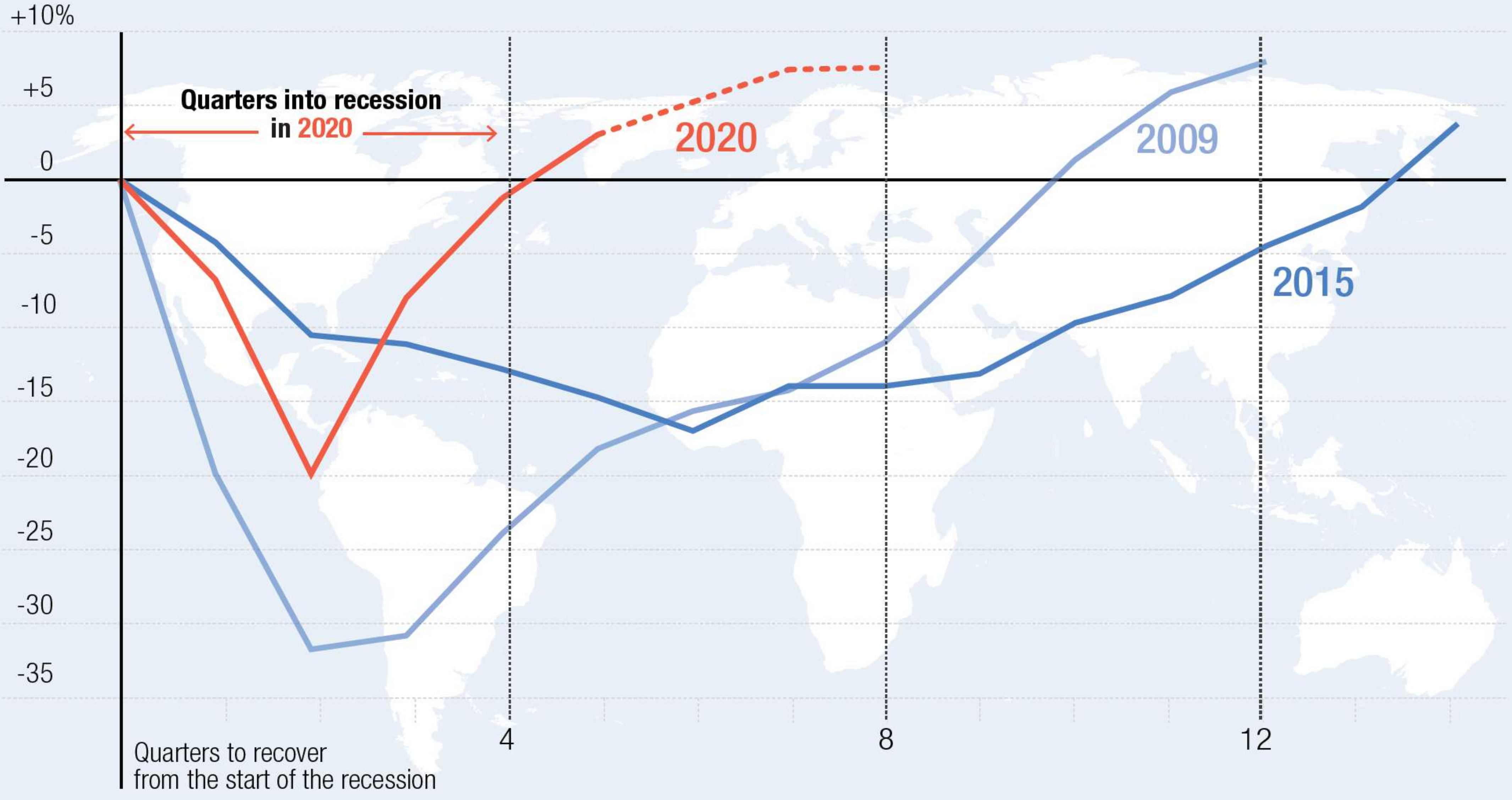
Services trade was able to to build on the positive momentum of the third quarter, despite autumn and winter COVID-19 waves, which in the northern hemisphere dashed hopes of smooth recovery and economic reopening. Despite this continued growth in the fourth quarter, services in the first quarter of 2021 are nowcast to remain 7 per cent below their levels one year ago, compared with year-over-year growth of 9 and 5 per cent nowcast for merchandise trade values and volumes, respectively. Signs of accelerated recovery in services trade will likely have to wait for reduced COVID-19 caseloads and a fuller economic reopening.



Weekly container ship arrivals in 2020
4 week moving average, and change over 2019
Week 04 of 2020 - 27 January
Weekly Port Calls 2020
50
100
500
1000
1500
Compared to 2019
-15% or below
-10%
-5%
0
+5%
+10%
+15% or above
Ships of 5000 GT and above. Source: UNCTAD – MarineTraffic data – 2020
UNITED NATIONS
UNCTAD
visualised by Julian Hoffmann

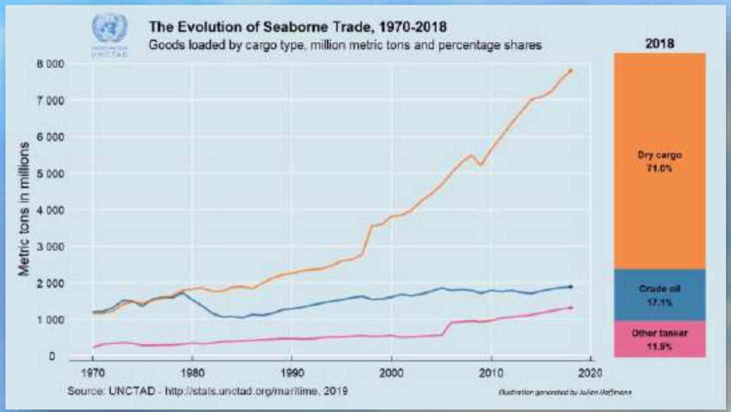
A faster recovery than in the last two trade recessions

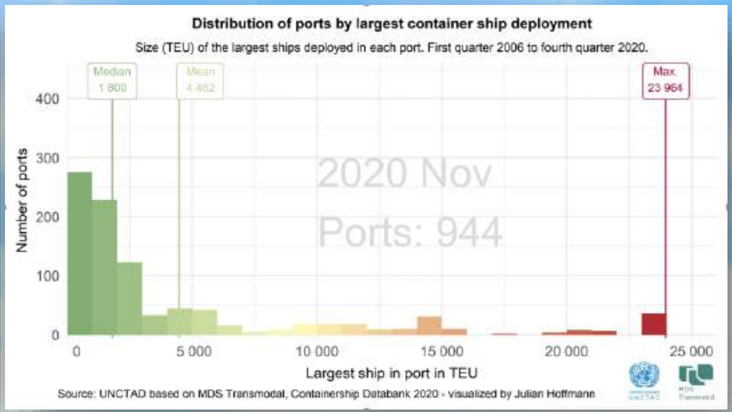
Cumulative change in global trade from the start of each recession

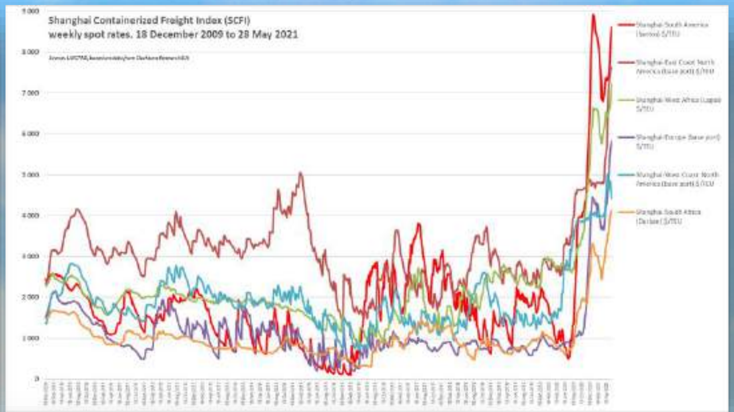


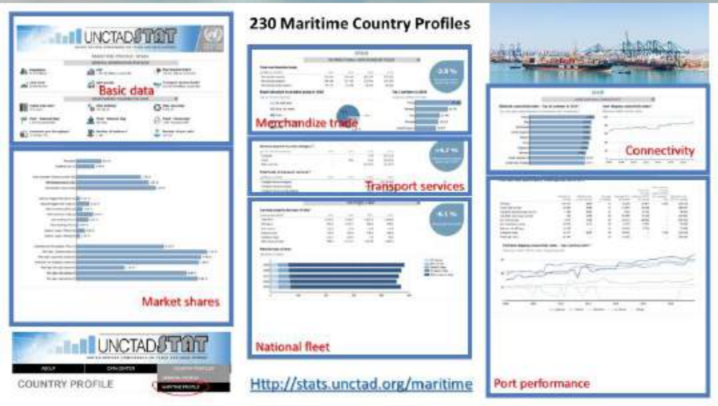
Source: UNCTAD calculations based on national statistics.

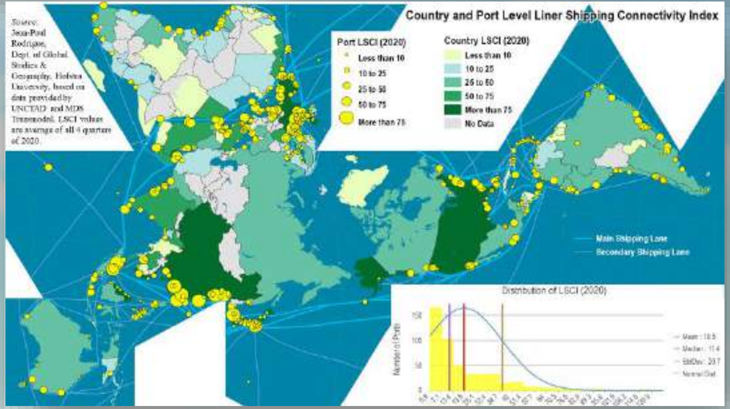
Source: www.UNCTAD.org

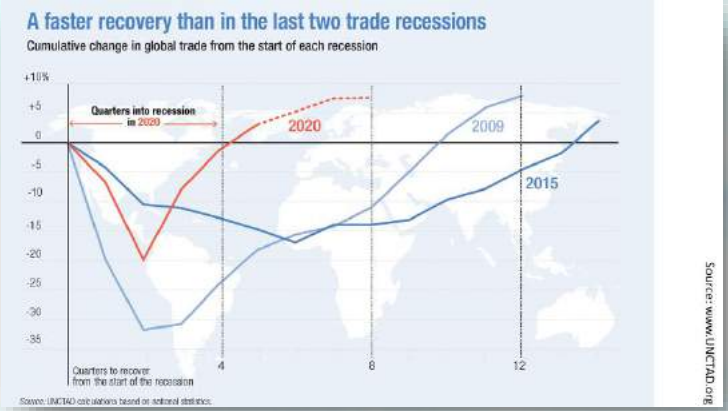












1. Pasado
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Seminarios Valenciaport:

Herramientas para analizar el mercado marítimo

2021
3 Junio

Indices y estadísticas de la UNCTAD

1. Pasado
2. Presente
3. Futuro

Herramientas de análisis del mercado marítimo: VCFI & ICP

Amparo Mestre Alcover

Fundación Valenciaport

VCFI Valencia Containerised Freight Index

ICP Índice de Conectividad Portuaria

valenciaport Autoridad Portuaria de Valencia

FUNDACIÓN VALENCIAPORT

Contenidos

| Valencia Containerised Freight Index (VCFI)

| Índice de Conectividad Portuaria 2.0 (ICP)

Contenidos

- Valencia Containerised Freight Index (VCFI)
- Índice de Conectividad Portuaria 2.0 (ICP)

Valencia Containerised Freight Index - Metodología

- **Evolución precios de exportación marítima en contenedor desde Valenciaport**
- **Mensual**
- **FAK, Tarifa spot + recargos**
- **Índice de panel**

Valencia Containerised Freight Index - Metodología

Área geográfica VCFI	Puertos de referencia
MEDITERRÁNEO OCCIDENTAL	Casablanca (MA), El Djazair (DZ), Túnez (TN)
EUROPA ATLÁNTICA	Felixstowe (GB), Hamburgo (DE), Amberes (BE)
MEDITERRÁNEO ORIENTAL	Alejandría (EG) Ashdod (IL) El Pireo (GR) Estambul (TR)
LEJANO ORIENTE	Shanghai (CN), Hong Kong (HK), Port Kelang (MY), Singapur (SG), Busan (KR), Tokyio (JP), Kaohsiung (TW), Bangkok (TH), Ho Chi Minh (VN)
ORIENTE MEDIO	Jeddah (SA), Jebel Ali (AE)
EEUU - CANADÁ ATLÁNTICO	Nueva York (US), Montreal (CA), Houston (US), Miami (US)
CENTROAMÉRICA Y CARIBE	Veracruz (MX), Cartagena (CO) Altamira (MX), Caucedo (DO)
LATINOAMÉRICA ATLÁNTICA	Santos (BR), Buenos Aires (AR)
ÁFRICA OCCIDENTAL	Luanda (AO), Bata (GQ), Dakar (SN)
ÁFRICA COSTA ORIENTAL	Durban (ZA), Port Elisabeth (ZA)
LATINOAMÉRICA PACÍFICA	Callao (PE), San Antonio (CL)
SUBCONTINENTE INDIO	Nhava Sheva (IN), Kandla (IN)
PAÍSES BÁLTICOS	San Petersburgo (RU), Helsinki (FI)

$$f_j = \sum_{i=1}^{n} \frac{t_{ij}}{n}$$

$$VCFI = \sum_{j=1}^{m} k_j * f_j$$

donde:

fj= flete promedio para Puerto j

t_ij= flete informado por el panelista I para el Puerto j

n = número de panelistas para el Puerto j

k_j = factor de ponderación para el Puerto j

m = número de puertos

Valencia Containerised Freight Index - Publicación


CONTACTO SEDE ELECTRÓNICA PERFIL DEL CONTRATANTE

AUTORIDAD PORTUARIA NEGOCIO PUERTO-CIUDAD PASAJEROS

El Valencia Containerised Freight Index (VCFI) supera los 2.000 puntos con un crecimiento en abril del 17,39%

7 mayo, 2021

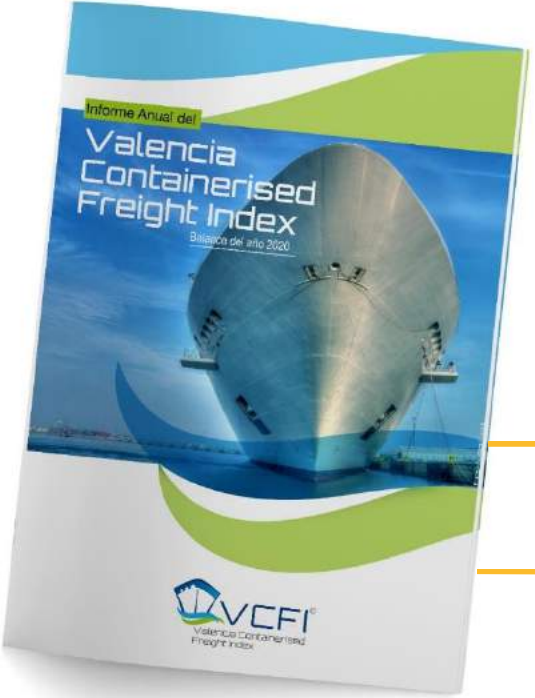
Hay que destacar el incremento del 30% de los fletes de exportación hacia Estados Unidos y Canadá.

En el subíndice del Mediterráneo Occidental, el índice aumenta un 19,3% respecto a marzo.

El tráfico portuario se posiciona en niveles por encima de la situación previa a la pandemia.

La flota comercialmente inactiva representa un 0,8% de la capacidad total.

Valencia Containerised Freight Index - Publicación



Dr. Vicente J. Pallardó

Analista de coyuntura económica. Investigador Senior IEI.

Entorno Macroeconómico:

2020_UN AÑO SIN PRECEDENTES DEJA UN LEGADO DE INCÓGNITAS

Professor HE Haralambides

Dalian Maritime University (China) & University Paris 1 – Pantheon Sorbonne (France)

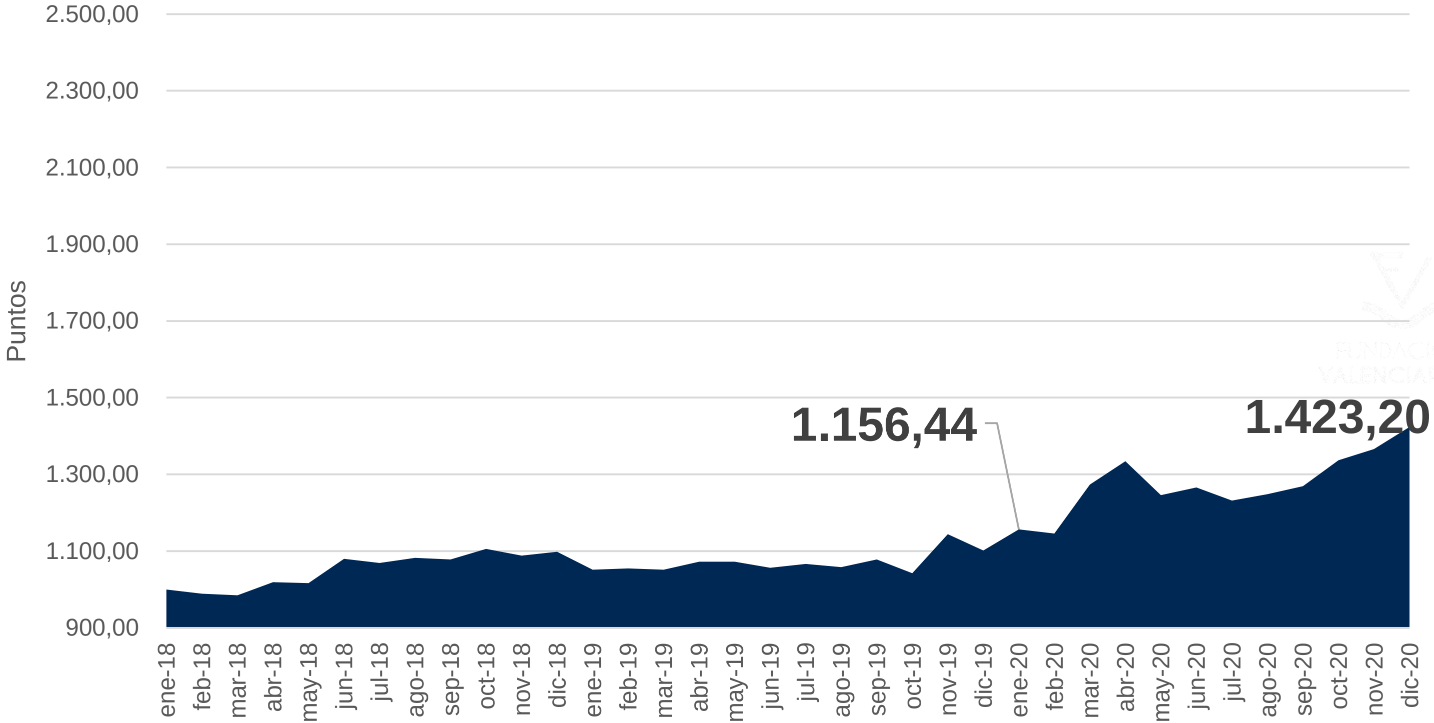
Economía Marítima:

TENDENCIAS GLOBALES DE LA ECONOMÍA MARÍTIMA Y PORTUARIA EN 2020

VCFI: COMPORTAMIENTO DE LOS FLETES EN 2020

Valencia Containerised Freight Index - Evolución

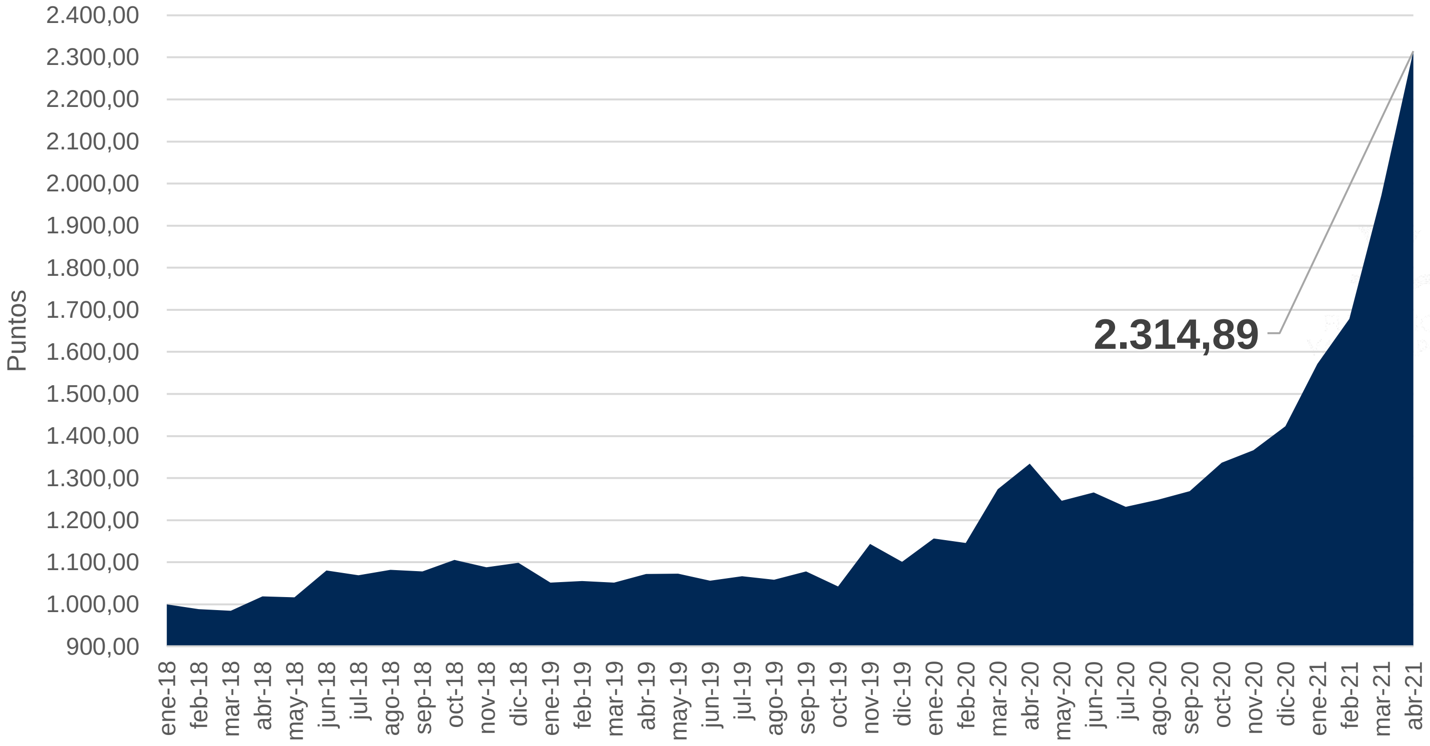
Valencia Containerised Freight Index (201801=1000)



2020: 23%

Valencia Containerised Freight Index - Evolución

Valencia Containerised Freight Index (201801=1000)



2020: 23%

2021: 47%

Valencia Containerised Freight Index - Evolución

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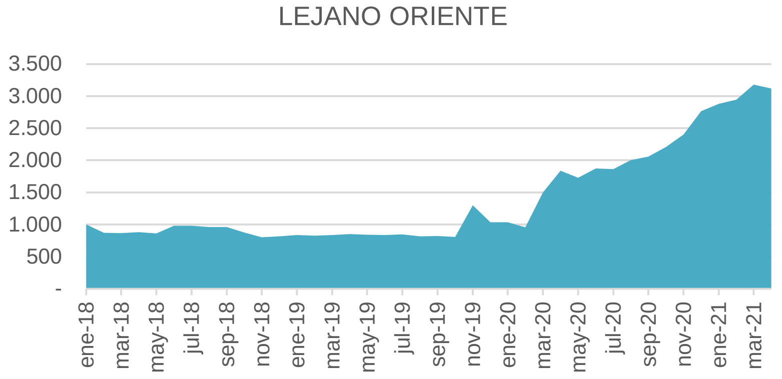
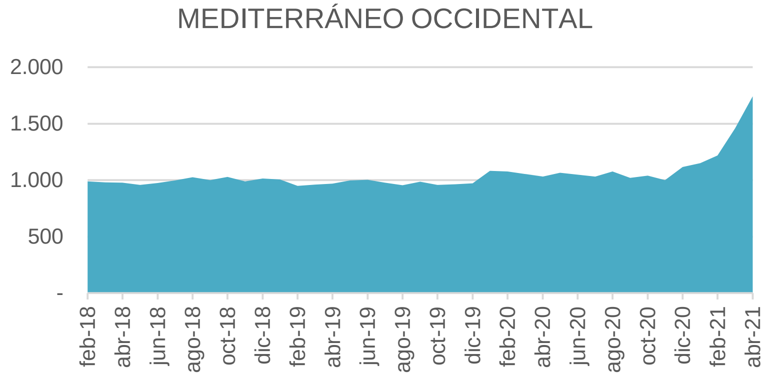
Autoridad Portuaria de Valencia





Área geográfica	2020	2021
AFRICA COSTA ORIENTAL	↓	↑
AFRICA COSTA OCCIDENTAL	↑	↑
CENTROAMERICA Y CARIBE	↓	↑
EUROPA ATLANTICA	↓	↑
LATINOAMERICA ATLANTICA	↓	↑
LATINOAMERICA PACIFICA	↓	↑
LEJANO ORIENTE	↑	↑
PAÍSES BÁLTICOS	↓	↑
MED- OCCIDENTAL	↑	↑
MED. ORIENTAL	↓	↑
ORIENTE MEDIO	↑	↑
EEUU Y CANADA	↑ ↓	↑
SUBCONT. INDIO	↑	↑

VCFI Valencia Containerised Freight Index

ICP Índice de Conectividad Portuaria

Valencia Containerised Freight Index - Evolución

Demanda

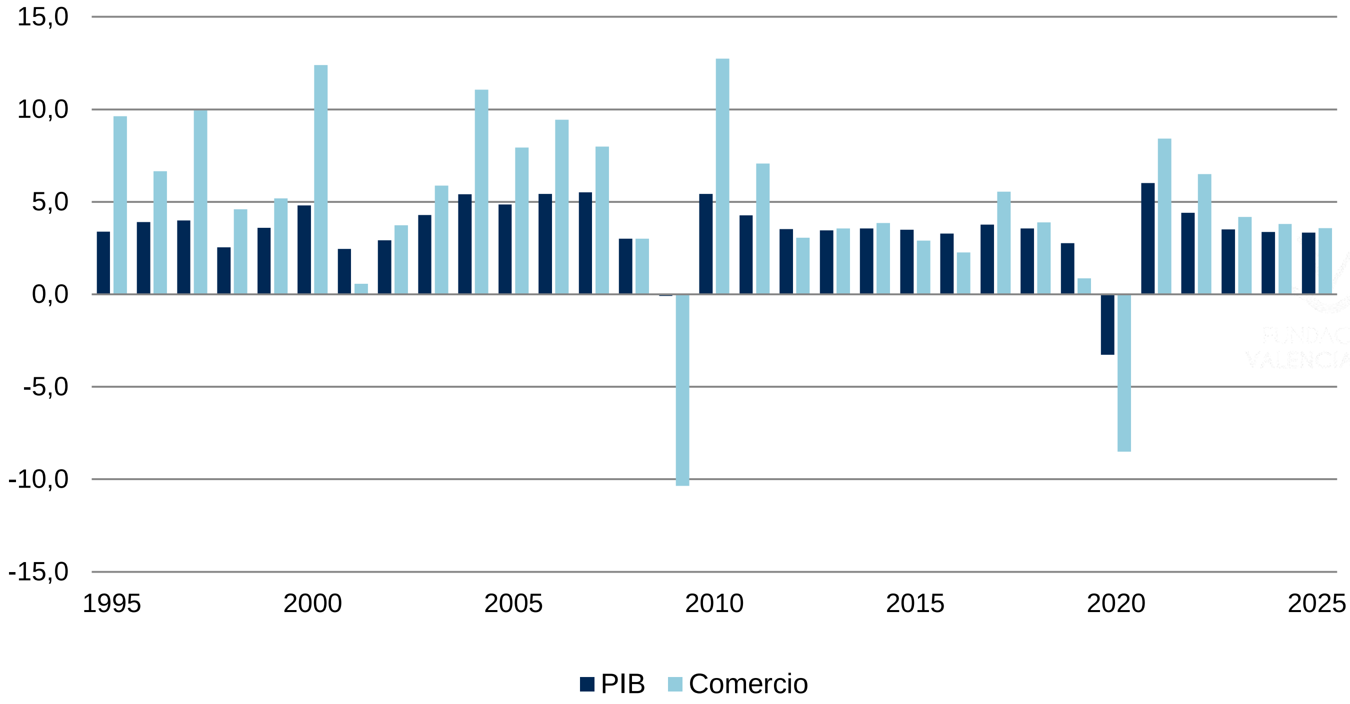
- *Entorno económico mundial*
- *Mercado marítimo*
- Comercio internacional y tráfico portuario
- Foco regional: comercio exterior España y hinterland

Oferta

- Costes operativos navieras (combustible)
- Ajuste de oferta (blank sailings, flota ociosa, pedidos)
- Equipamientos
- Situación portuaria

Valencia Containerised Freight Index –
Evolución Demanda

Crecimiento del PIB y el comercio mundial



2020

PIB: -3,3%

COM: -8,5%

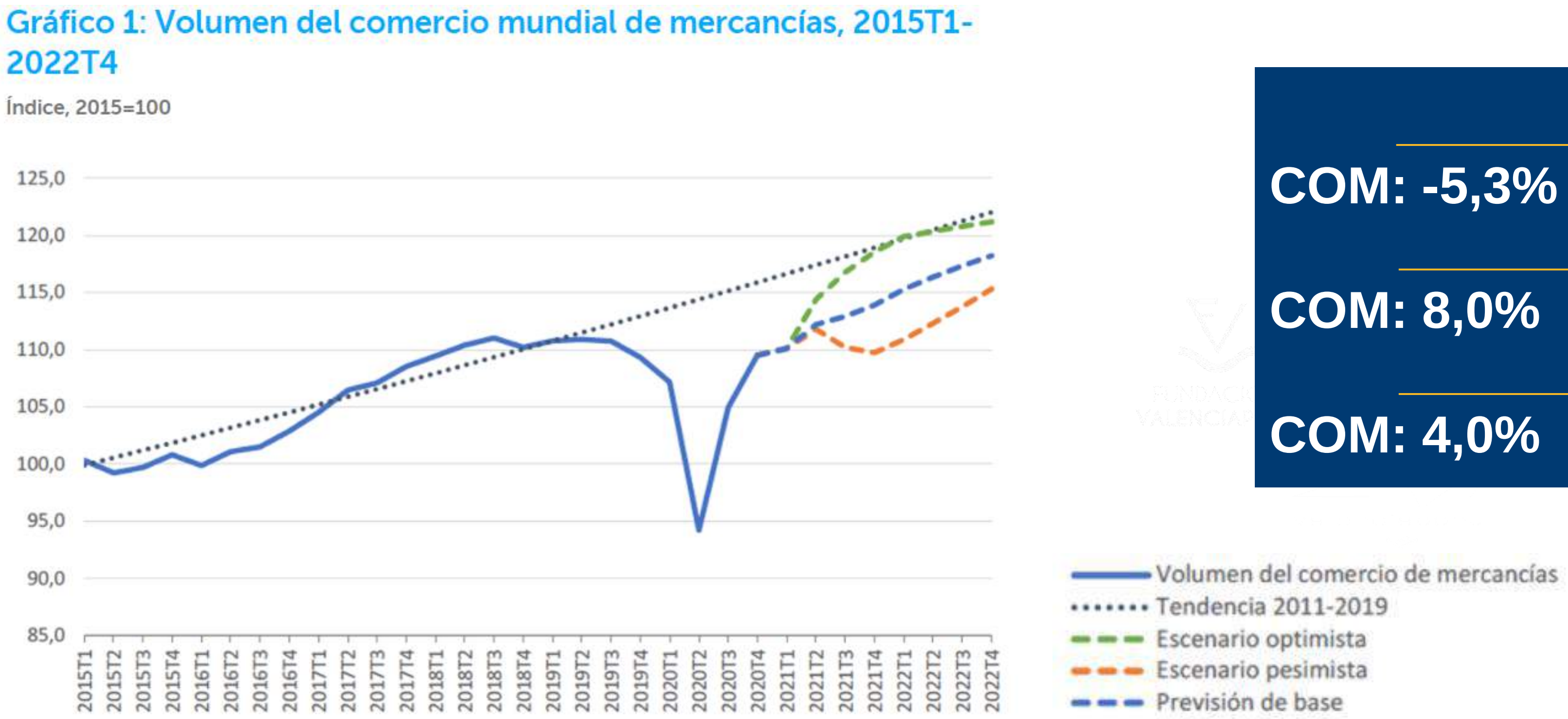
2021

PIB: 6%

COM: 8,4%

Fuente: FMI

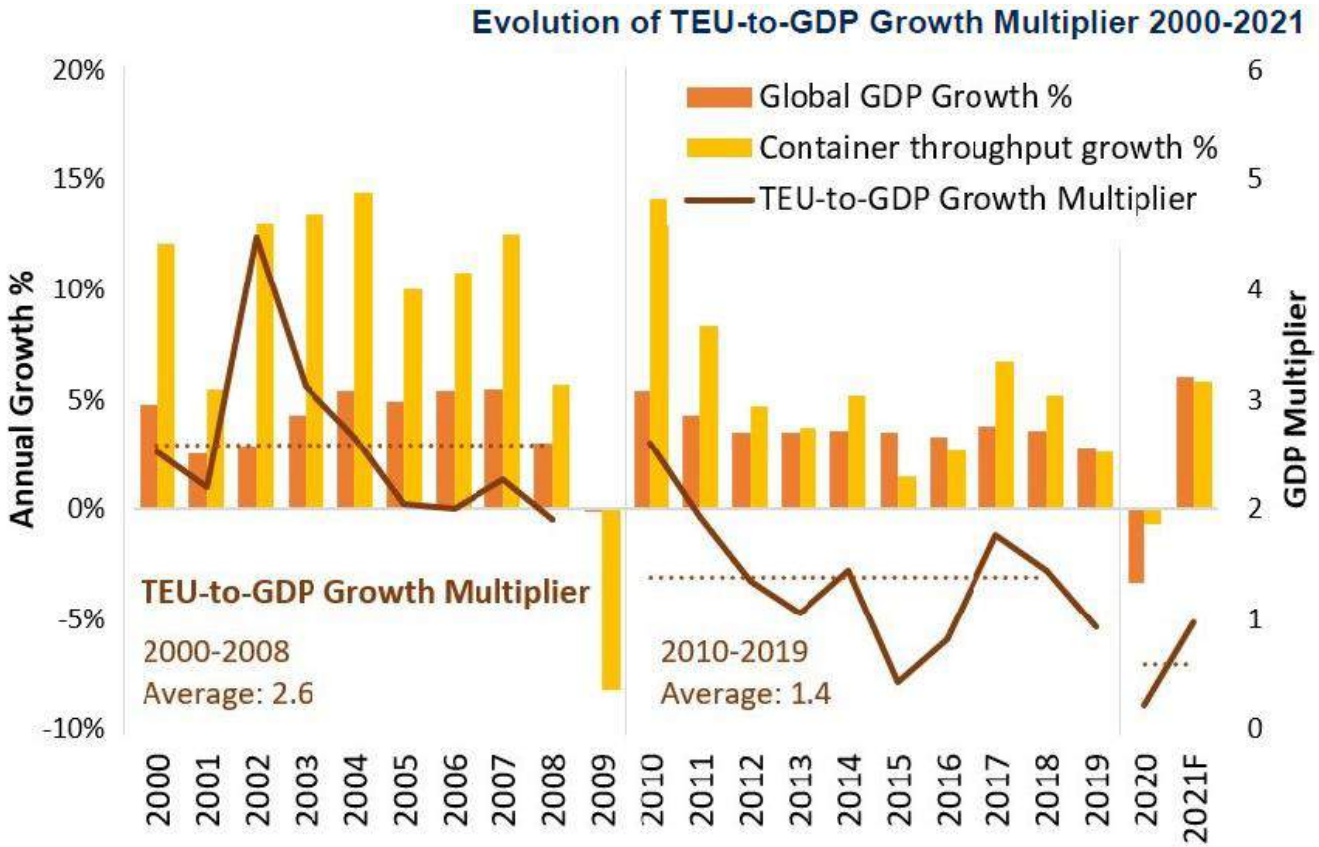
Valencia Containerised Freight Index – Evolución Demanda



2020
COM: -5,3%
2021
COM: 8,0%
2022
COM: 4,0%

Fuente: OMC y UNCTAD para los datos sobre el volumen de comercio; OMC previsiones

Valencia Containerised Freight Index – Evolución Demanda



2021

PIB: 6%

TEU: 5,8%

Fuente: Alphaliner

Valencia Containerised Freight Index – Evolución Demanda

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RWI/ISL Container Throughput Index (2015=100)

Boom Demanda

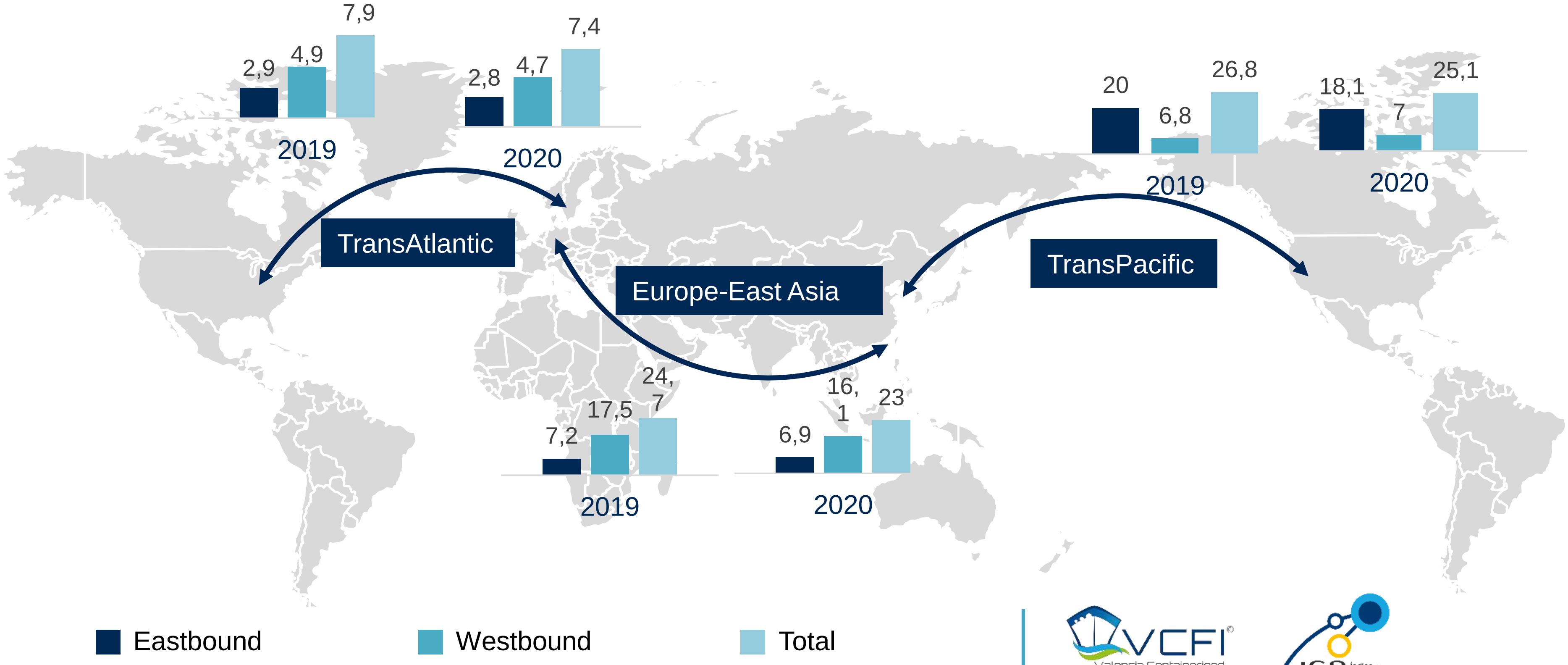
Fuente: Institute of Shipping Economics and Logistics & Leibniz-Institut für Wirtschaftsforschung

Valencia Containerised Freight Index

ICP Índice de Conectividad Portuaria

Valencia Containerised Freight Index – Evolución Demanda

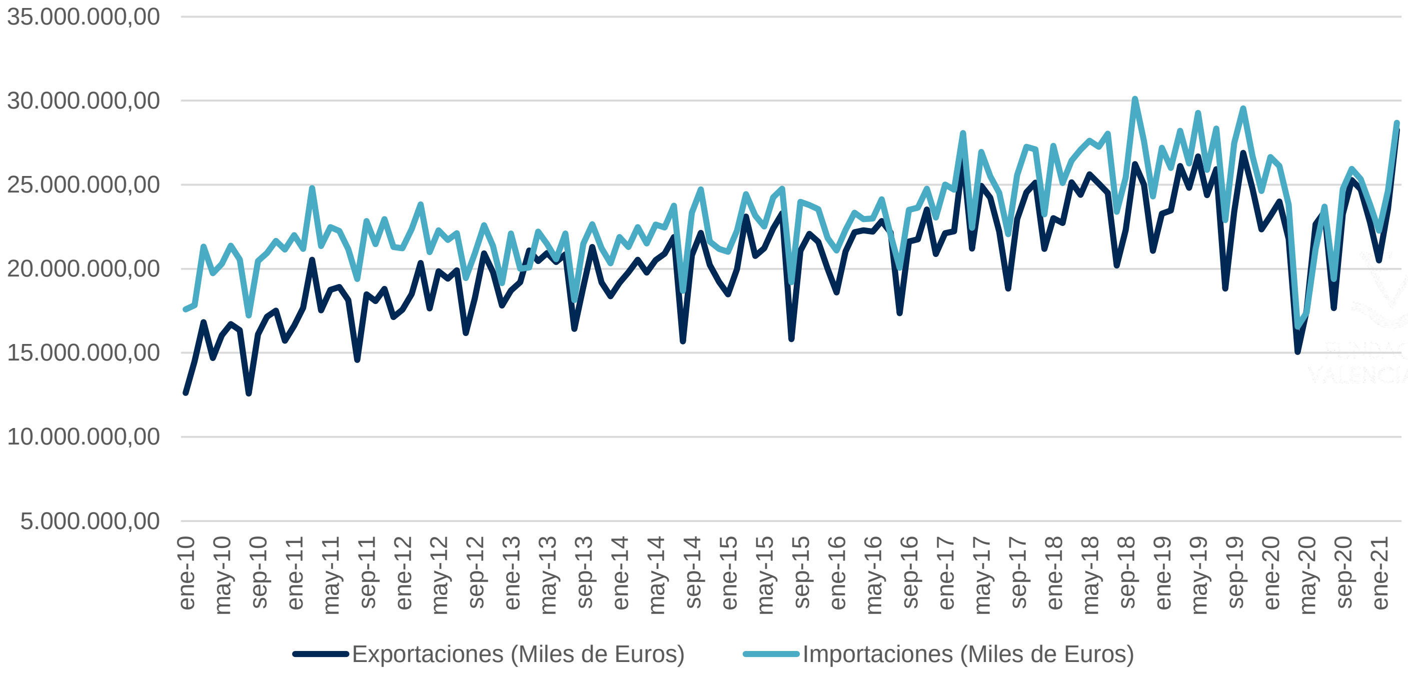
Flujos East – West, millones de TEU



Fuente: Review of Maritime Transport 2020, UNCTAD

Valencia Containerised Freight Index –
Evolución Demanda

Comercio Exterior España, exportaciones e importaciones. Miles Euros)

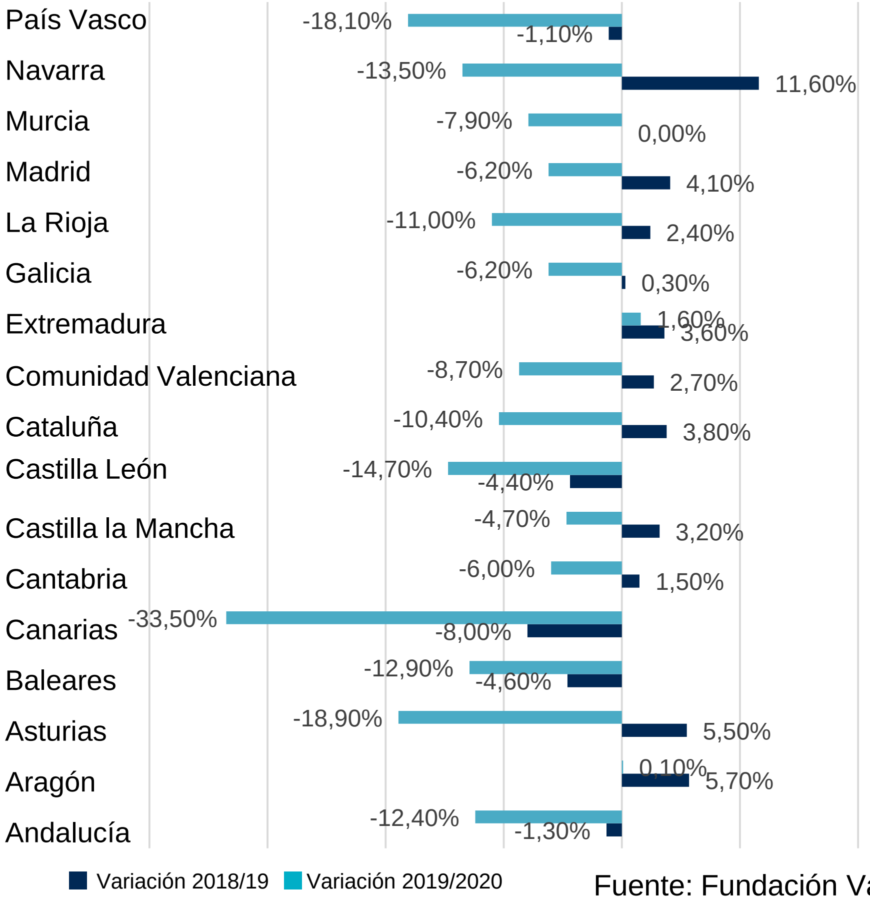


2020

X: -10%
M: -15%
Total: -12%

Fuente: Fundación Valenciaport con datos AEAT

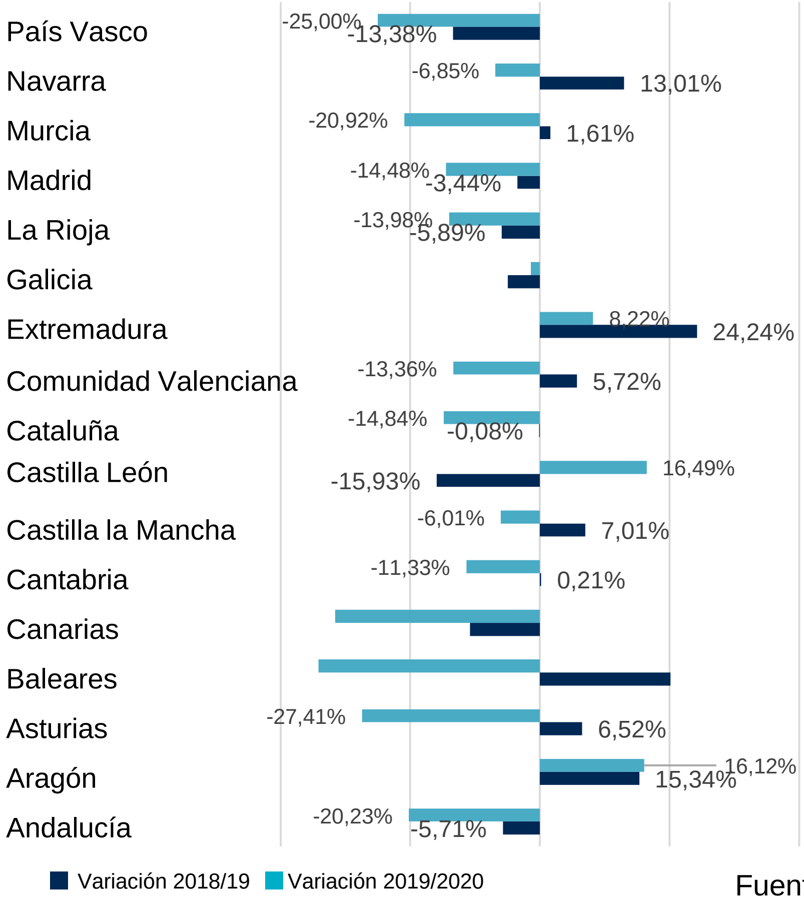
Valencia Containerised Freight Index –
Evolución Demanda



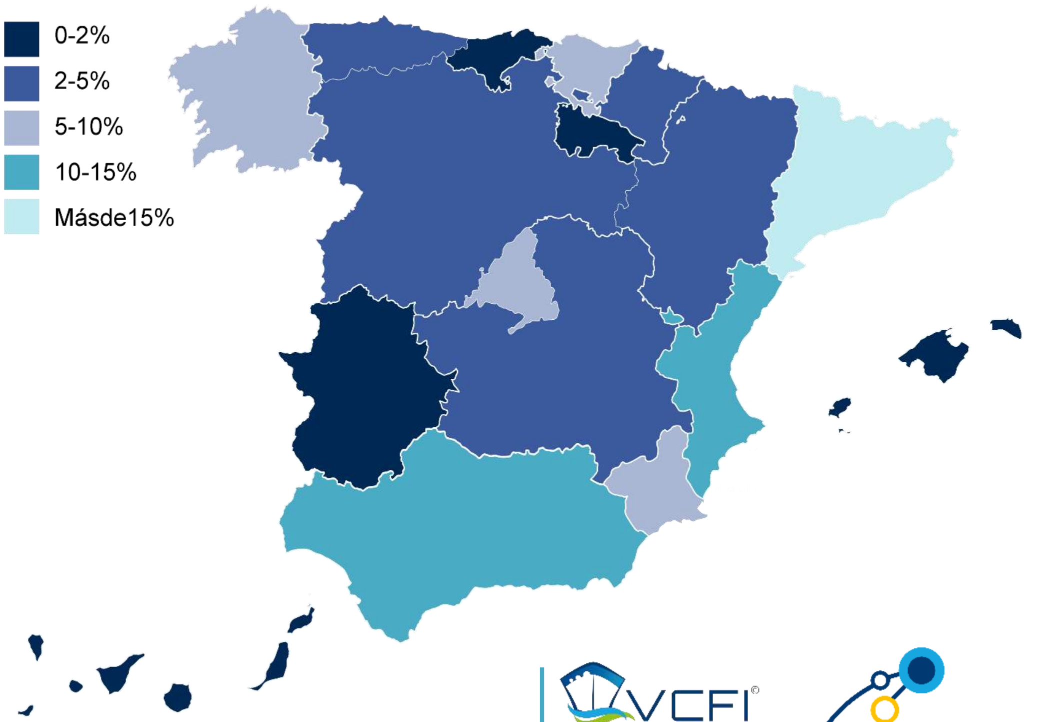
Origen de la Exportación

Fuente: Fundación Valenciaport con datos AEAT

Valencia Containerised Freight Index –
Evolución Demanda

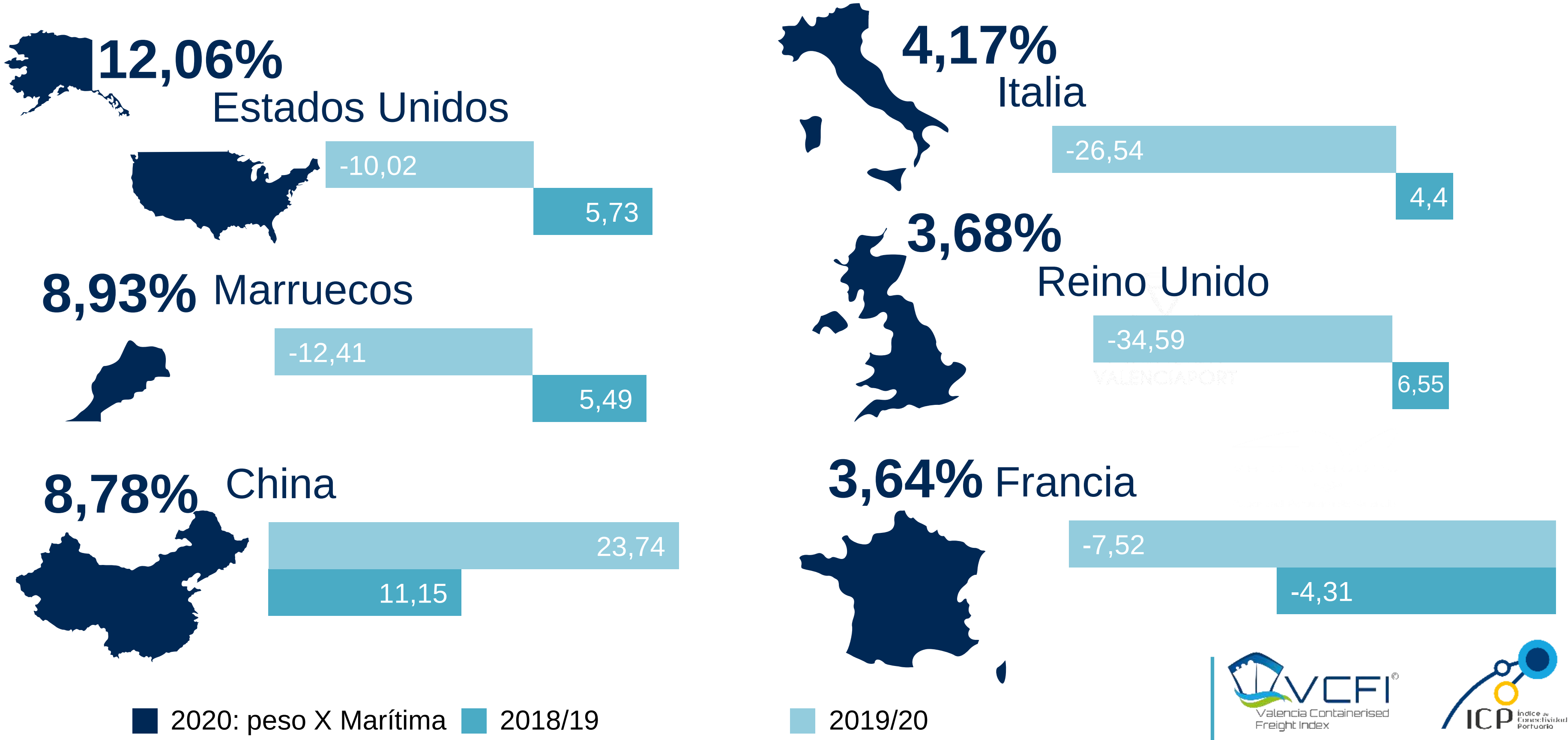


Origen de la exportación marítima



Fuente: Fundación Valenciaport con datos AEAT

Valencia Containerised Freight Index – Evolución Demanda



Valencia Containerised Freight Index – Evolución Demanda

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Cuadro de Mando, principales Zonas VCFI

	China	Hong Kong	Singapur	Corea del Sur	Japón	Vietnam	Tailandia	Taiwan	Malasia
Crecimiento económico (% de cambio anual a precios constantes)	1,85	-7,47	-6,00	-1,88	-5,27	1,60	-7,15	0,048	-6,00
Evolución exportaciones de bienes (% de variación)	0.438	-5,80	-6,85	-6,44	-11,59	--	-8,72	-1,50	-10,22
Evolución importaciones de bienes (% de variación)	3,95	-9,15	-2,11	-2,60	-8,32	-0,88	-16,32	-3,56	-7,53

Fuente: IIMF

	EE.UU	Canadá
Crecimiento económico (% de cambio anual a precios constantes)	-4,27	-7,14
Evolución exportaciones de bienes (% de variación)	-10,61	-10,42
Evolución importaciones de bienes (% de variación)	-9,58	-11,92

	Marruecos	Túnez	Argelia
Crecimiento económico (% de cambio anual a precios constantes)	-6,97	-7,04	-5,46
Evolución exportaciones de bienes (% de variación)	-26,80	-18,00	-2,50
Evolución importaciones de bienes (% de variación)	-16,07	-20,00	-2,68

VCFI© Valencia Containerised Freight Index

ICP Índice de Conectividad Portuaria

Valencia Containerised Freight Index – Evolución Demanda

Alimentación, bebida y tabaco

12.818,2 M. Euros

13% 2018/2019 | **14%** 2019/2020

Maquinaria y equipo

10.336,2 M. Euros

-4% 2018/2019 | **-13%** 2019/2020

Coquerías y refino de petróleo

8.231,6 M. Euros

-5% 2018/2019 | **-39%** 2019/2020

Automóvil

12.778,9 M. Euros

-8% 2018/2019 | **-13%** 2019/2020

Industria química, farmacéutica

10.633,2 M. Euros

2% 2018/2019 | **-14%** 2019/2020

Valencia Containerised Freight Index - Evolución

Demanda

- *Entorno económico mundial*
- *Mercado marítimo*
- Comercio internacional y tráfico portuario
- Foco regional: comercio exterior España y hinterland

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- Costes operativos navieras (combustible)
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- Equipamientos
- Situación portuaria

Valencia Containerised Freight Index –
Evolución Oferta

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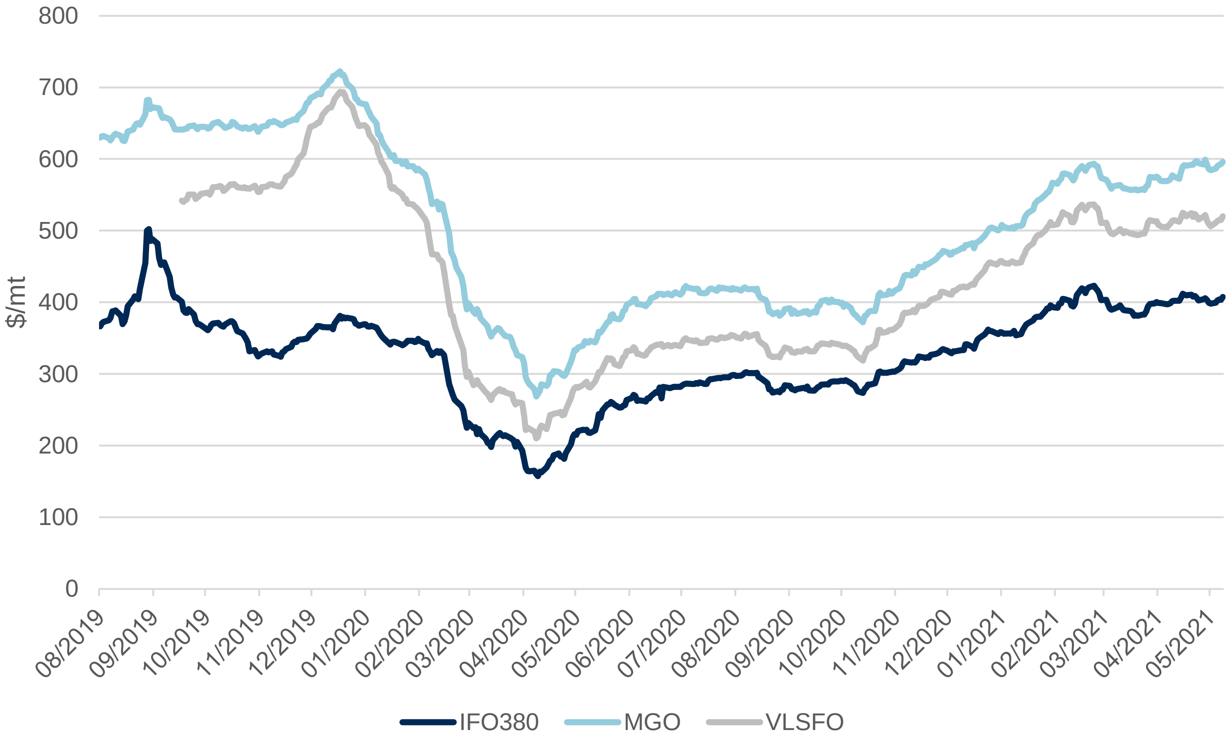
Evolución precio de los combustibles marinos



IMO 2020

EU Trading Schemes

Carbon Tax

$3.4trn investment to modernise fleet by 2050, says Stopford

Fuente: Shipandbunker

VCFI© Valencia Containerised Freight Index

ICP Índice de Conectividad Portuaria

Valencia Containerised Freight Index – Evolución Oferta

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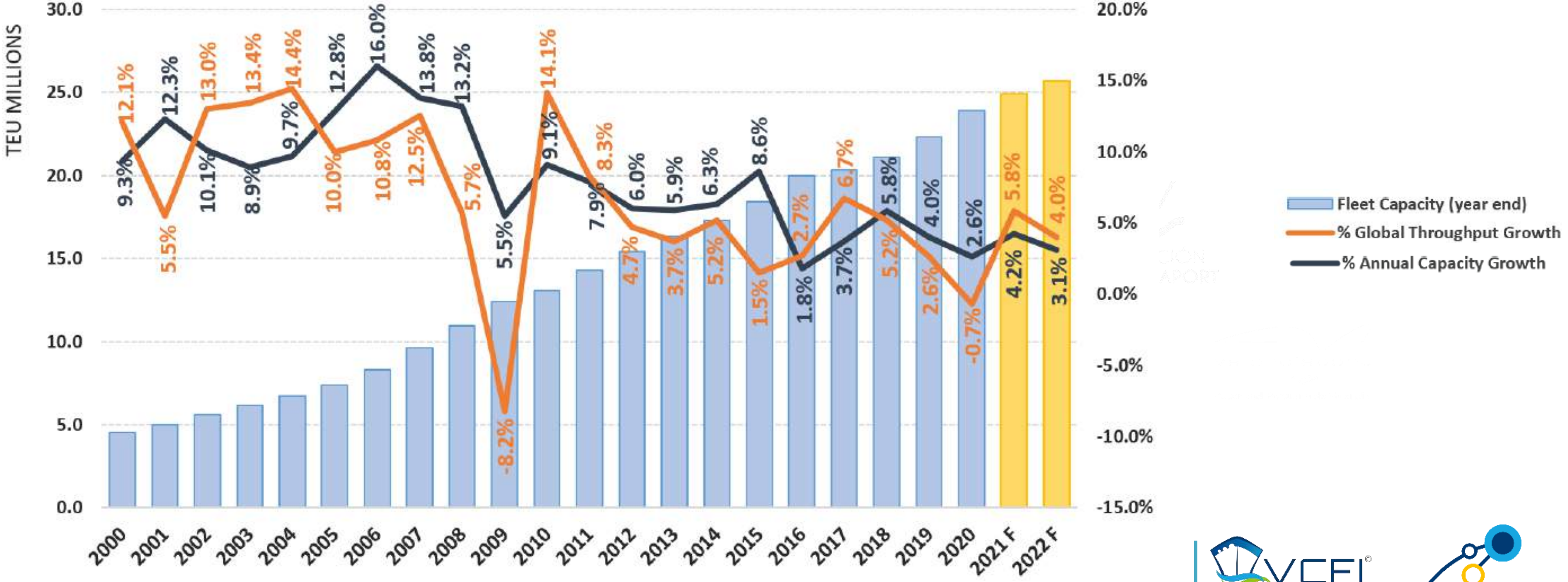
Global fleet capacity

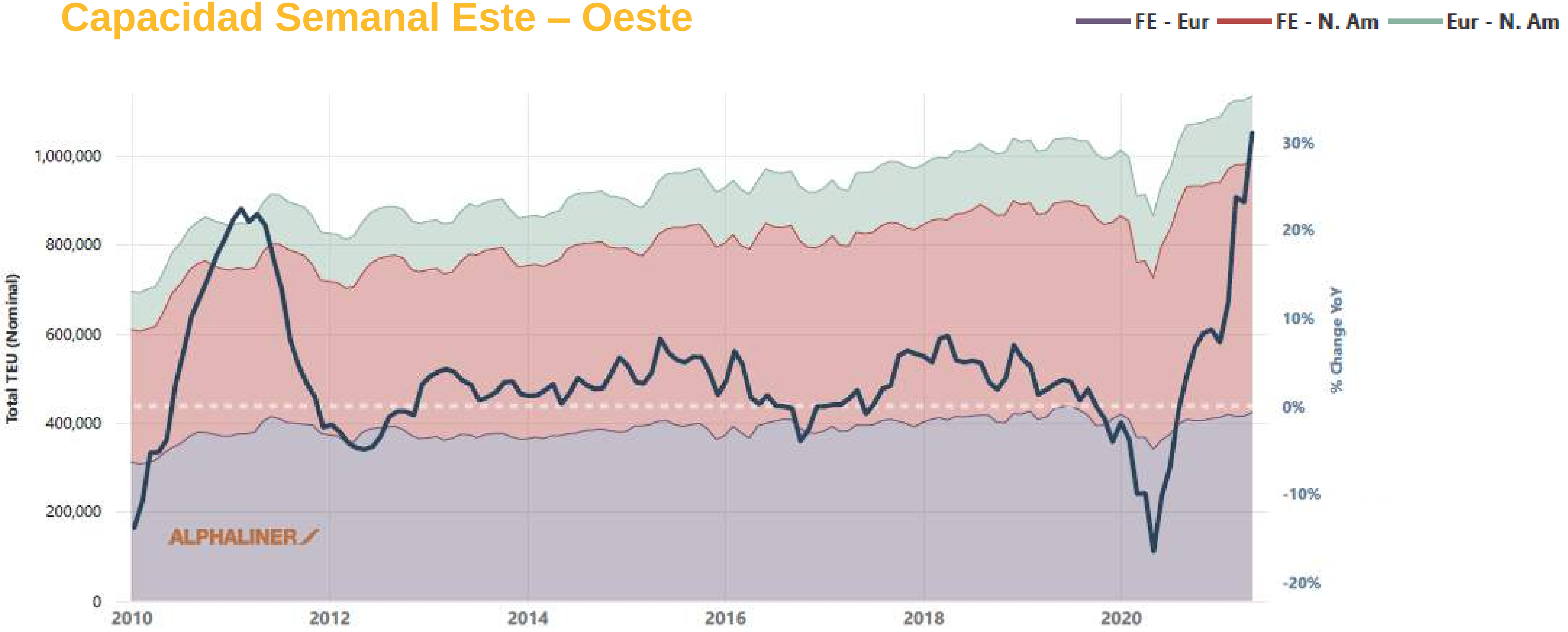


Fuente: Alphaliner

Valencia Containerised Freight Index

Valencia Containerised Freight Index – Evolución Oferta

Capacidad Semanal Este – Oeste



Fuente: Alphaliner

Valencia Containerised Freight Index – Evolución Oferta

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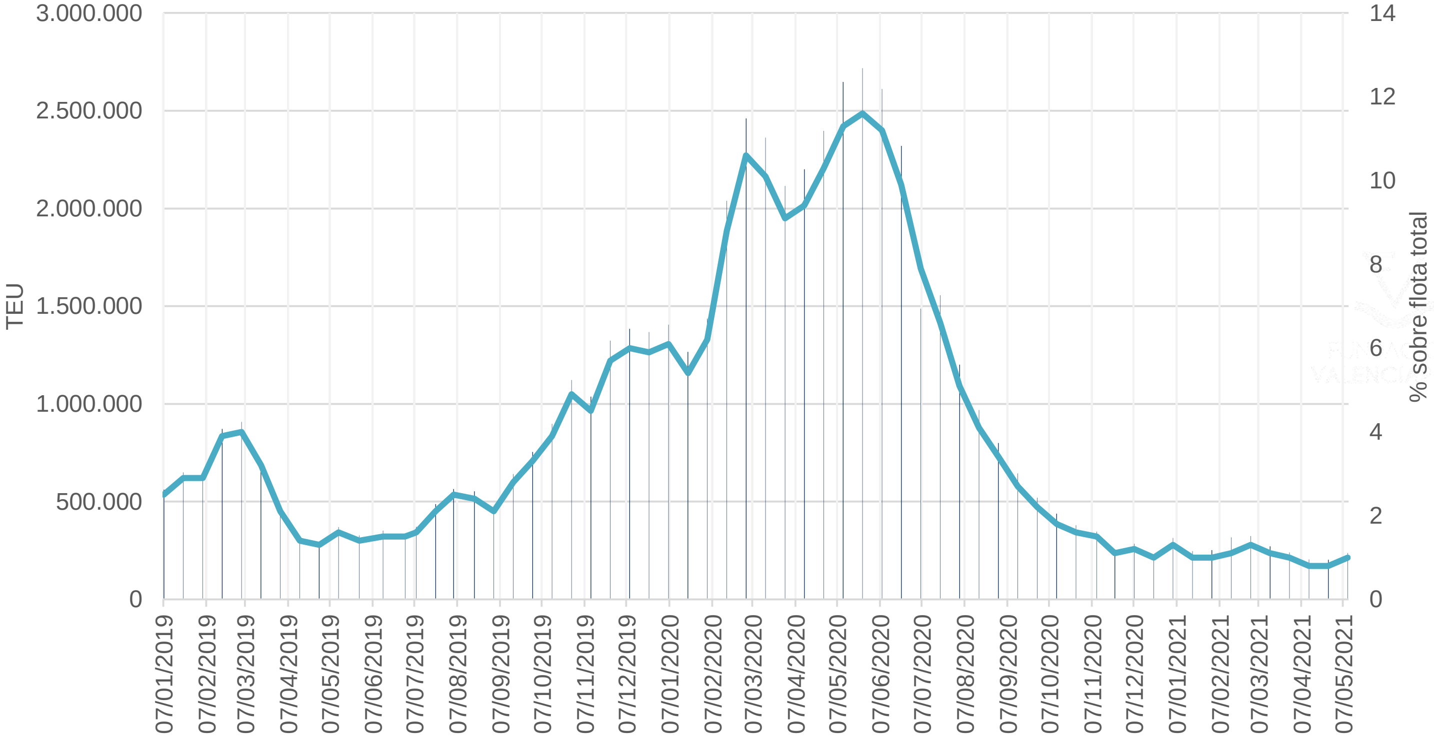
Evolución de la flota ociosa en el mercado



1er Semestre vs 2ndo Semestre

Fuente: Elaboración propia, datos Alphaliner

VCFI Valencia Containerised Freight Index

ICP Índice de Conectividad Portuaria

Valencia Containerised Freight Index – Evolución Oferta

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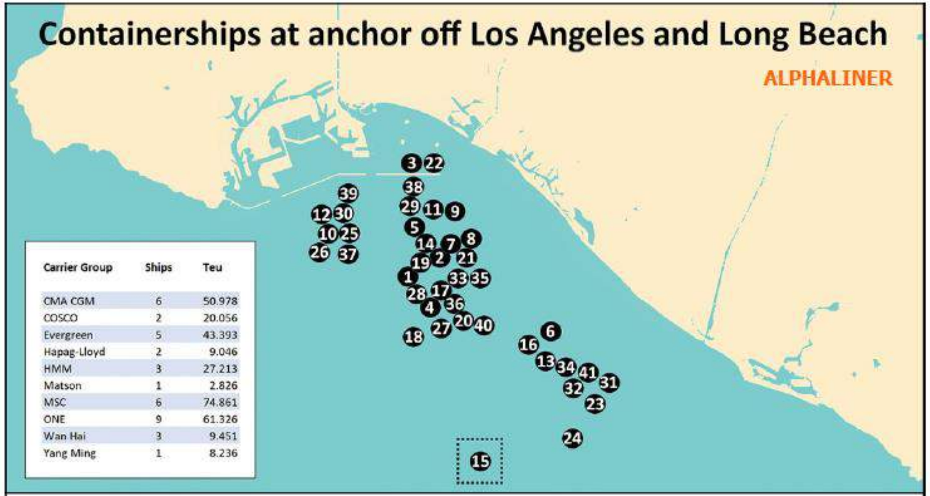
Congestión portuaria

Enero 2021

41 barcos



Carrier Group	Ships	Teu
CMA CGM	6	50.978
COSCO	2	20.056
Evergreen	5	43.393
Hapag-Lloyd	2	9.046
HMM	3	27.213
Matson	1	2.826
MSC	6	74.861
ONE	9	61.326
Wan Hai	3	9.451
Yang Ming	1	8.236

1	ANL TONGALA	4.311	ANL
2	CMA CGM FLORIDA	5.078	APL
3	PRESIDENT KENNEDY	7.471	APL
4	CMA CGM ANDROMEDA	11.365	CMA CGM
5	CMA CGM PEGASUS	11.365	CMA CGM
6	CMA CGM TITAN	11.388	CMA CGM
7	COSCO OCEANIA	10.020	COSCO
8	CSCL SPRING	10.036	COSCO
9	EVER ENVOY	6.332	Evergreen
10	EVER FRONT	12.118	Evergreen
11	EVER LAMBENT	9.466	Evergreen
12	EVER LIVEN	8.453	Evergreen
13	EVER SHINE	7.024	Evergreen
14	DALLAS EXPRESS	4.844	Hapag-Lloyd
15	KOBE EXPRESS	4.616	Hapag-Lloyd
16	HYUNDAI EARTH	10.081	HMM
17	HYUNDAI FAITH	8.566	HMM
18	HYUNDAI GLOBAL	8.566	HMM
19	MAERSK ALTAIR	11.294	Maersk
20	MAERSK EUREKA	13.102	Maersk
21	SYNERGY KEELUNG	4.253	Maersk
22	CAPT. THANASIS	2.826	Matson
23	MSC AINO	12.108	MSC
24	MSC ANTONELLA	8.819	MSC
25	MSC AURORA	13.050	MSC
26	MSC EVA	13.798	MSC
27	MSC RAVENNA	14.036	MSC
28	MSC TRIESTE	13.050	MSC
29	BREVIK BRIDGE	4.520	ONE
30	MOL CREATION	8.110	ONE
31	MOL EXPERIENCE	5.014	ONE
32	NYK LAURA	2.664	ONE
33	NYK NEBULA	4.922	ONE
34	NYK RIGEL	4.922	ONE
35	NYK VEGA	9.012	ONE
36	ONE COLUMBA	14.052	ONE
37	ONE CONTINUITY	8.110	ONE
38	IRENES ROSE	2.553	Wan Hai
39	WAN HAI 312	2.646	Wan Hai
40	WAN HAI 505	4.252	Wan Hai
41	YM UNIFORM	8.236	Yang Ming

1 February: 41 ships at anchor for a total of 336,449 teu

Fuente: Alphaliner y Lars Jensen

VCFI Valencia Containerised Freight Index

ICP Índice de Conectividad Portuaria

Valencia Containerised Freight Index – Evolución Oferta

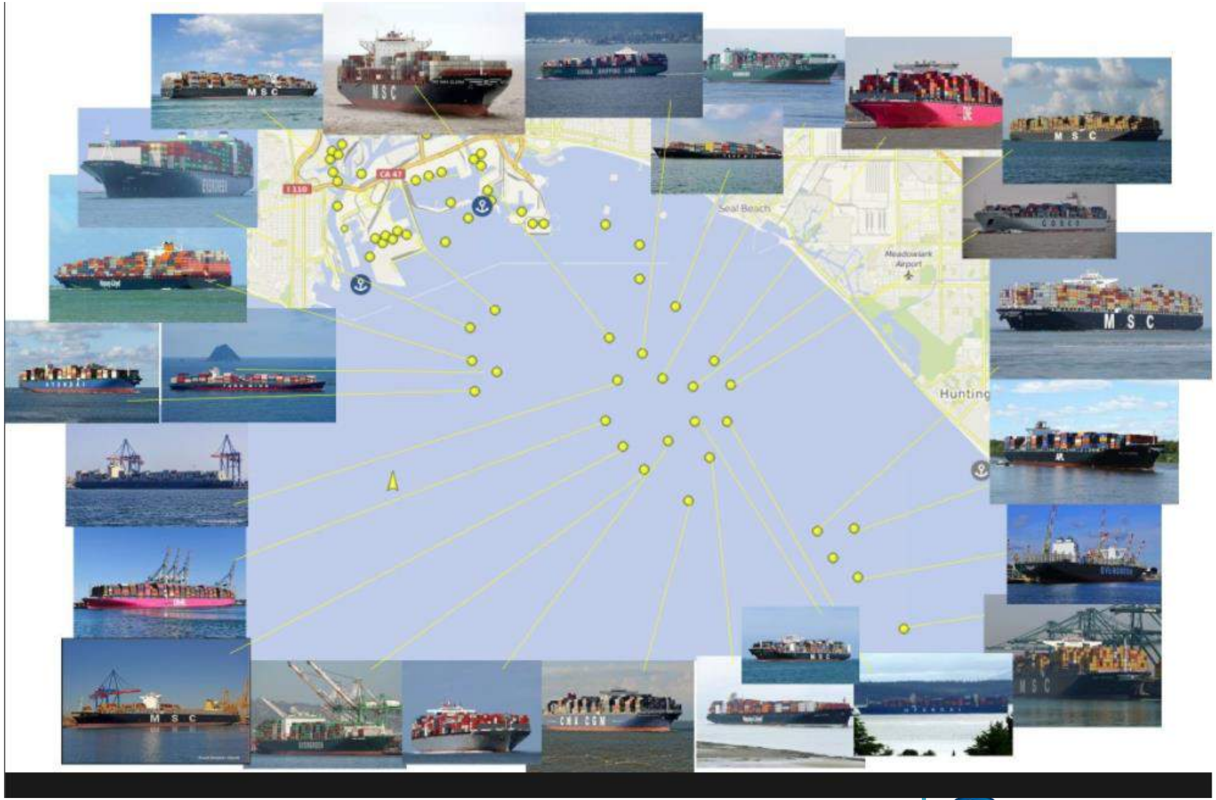
Congestión portuaria

Enero 2021

41 barcos

Abril 2021

21 barcos



Fuente: Alphaliner y Lars Jensen

Valencia Containerised Freight Index – Evolución Oferta

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Congestión portuaria

Mayo 2021

Nation (Location)	Logistics Situation							
	Terminal				Intermodal			
	Berth	Yard	Gate	Labor/Gang	Truck	Rail	Barge	Feeder
Los Angeles Long Beach	🔴	🔴	🔴	🔴	🔴	🔴	🔴	🔴
Tacoma	🟢	🟢	🟢	🟢	🟢	🟡	🟢	🟢
Newyork	🔴	🟡	🟡	🟡	🟡	🔴	🟢	🟢
Canada	🟡	🟡	🟡	🟢	🟢	🟢	🟢	🟢
Colombia	🟡	🟡	🟡	🟡	🟢	🟢	🟢	🟢
Netherland (Rotterdam)	🔴	🔴	🔴	🔴	🔴	🟢	🔴	🔴
Germany (Hamburg)	🟡	🔴	🟡	🟡	🟡	🟢	🟢	🟡
UK (Southampton & London Gateway)	🔴	🔴	🔴	🔴	🟡	🟡	🟡	🟡
Spain (Barcelona & Valencia)	🟢	🟢	🟡	🟢	🟢	🟢	🟢	🟢

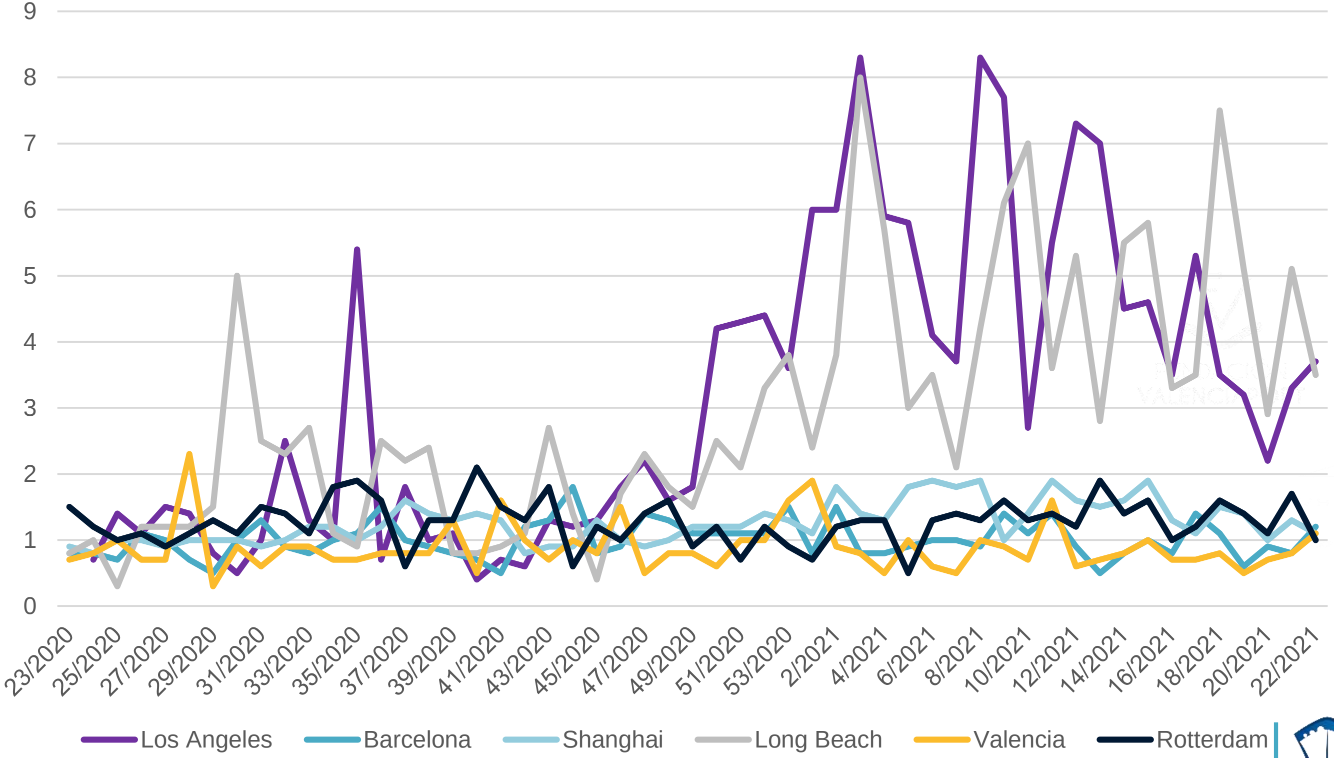
Fuente: HMM Terminal Outlook

VCFI© Valencia Containerised Freight Index

ICP Índice de Conectividad Portuaria

Valencia Containerised Freight Index – Evolución Oferta

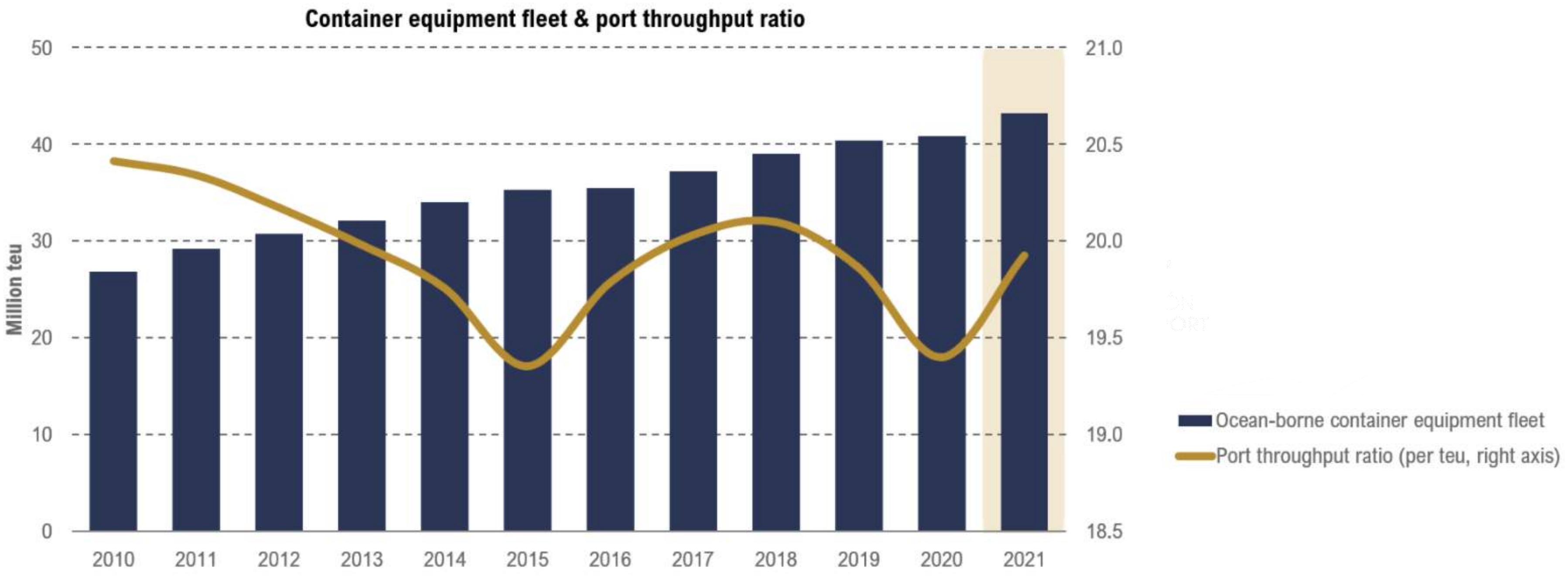
Congestión portuaria, Anchorage time, 2020 - 2021



Fuente: Elaboración propia, datos Marine Traffic

Valencia Containerised Freight Index –
Evolución Oferta

Equipamientos

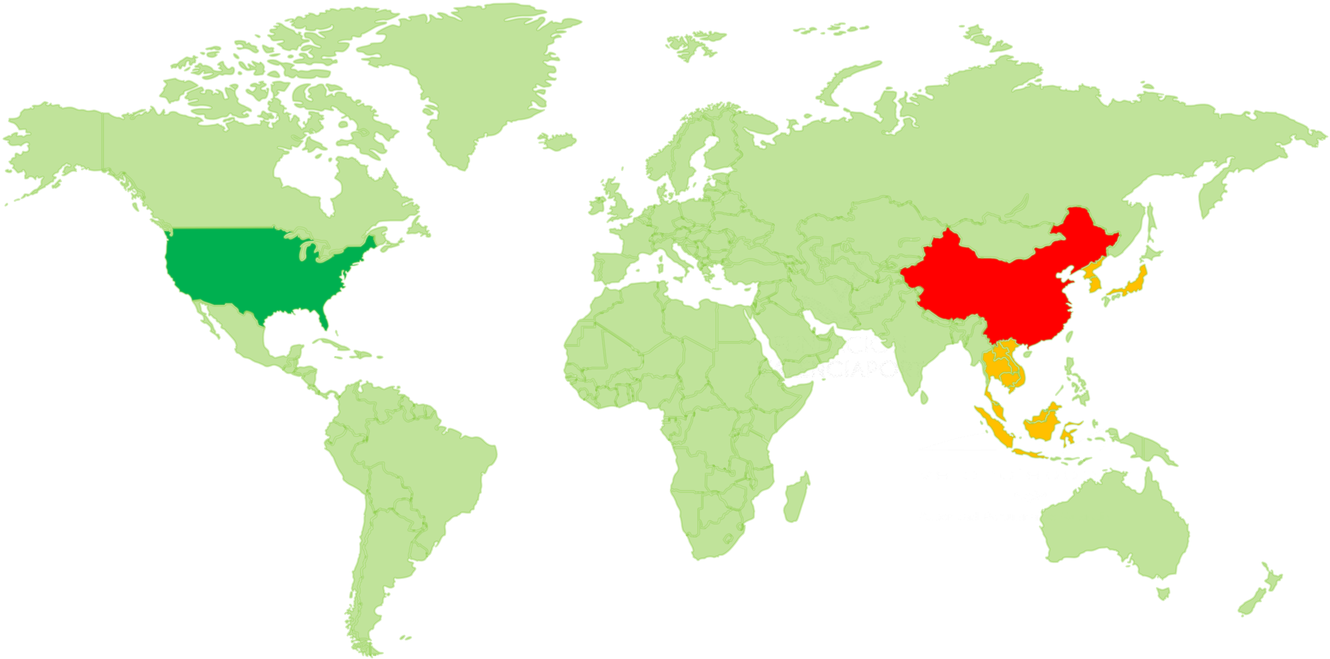


Fuente: Drewry's Container Equipment Forescaster 1Q21

Valencia Containerised Freight Index –
Evolución Oferta

Equipamientos

50%-60%



Fuente: Elaboración propia, datos SEA INTELLIGENCE

Valencia Containerised Freight Index – ¿Y el segundo semestre de 2021?

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Demanda

- Boom demanda
- Avance pandemia
- Reequilibrio gasto

Oferta

- Mercado tensionado
- Estrategias de mitigación
- Equipamientos, flotas

VCFI Valencia Containerised Freight Index

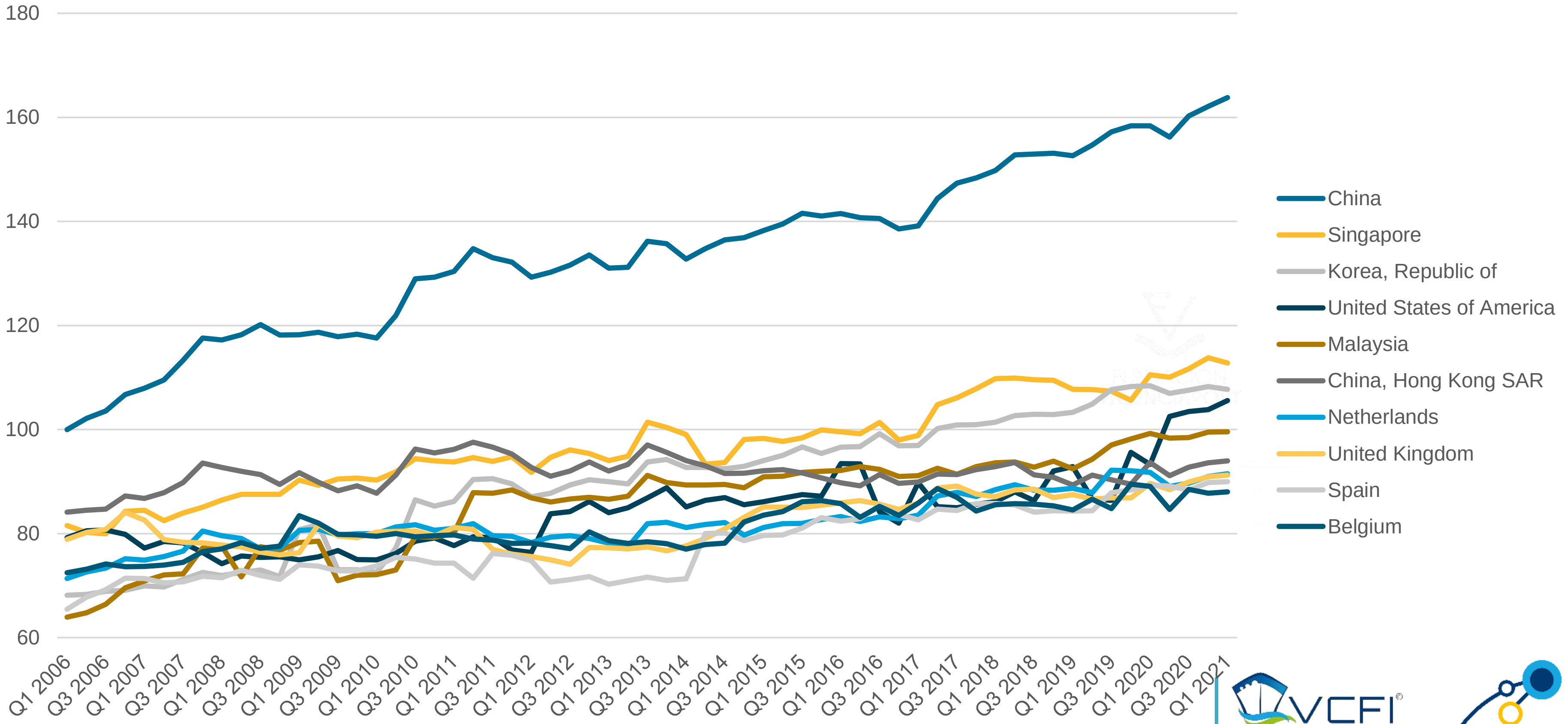
ICP Índice de Conectividad Portuaria

Contenidos

Valencia Containerised Freight Index (VCFI)

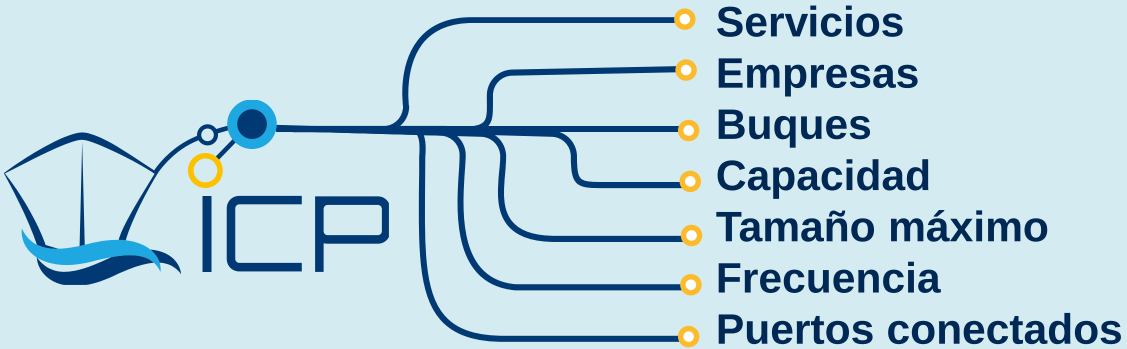
Índice de Conectividad Portuaria 2.0 (ICP)

Índice de Conectividad Portuaria 2.0



Fuente: Liner Shipping Connectivity Index, UNCTAD

Índice de Conectividad Portuaria 2.0 – VALENCIAPORT ICP



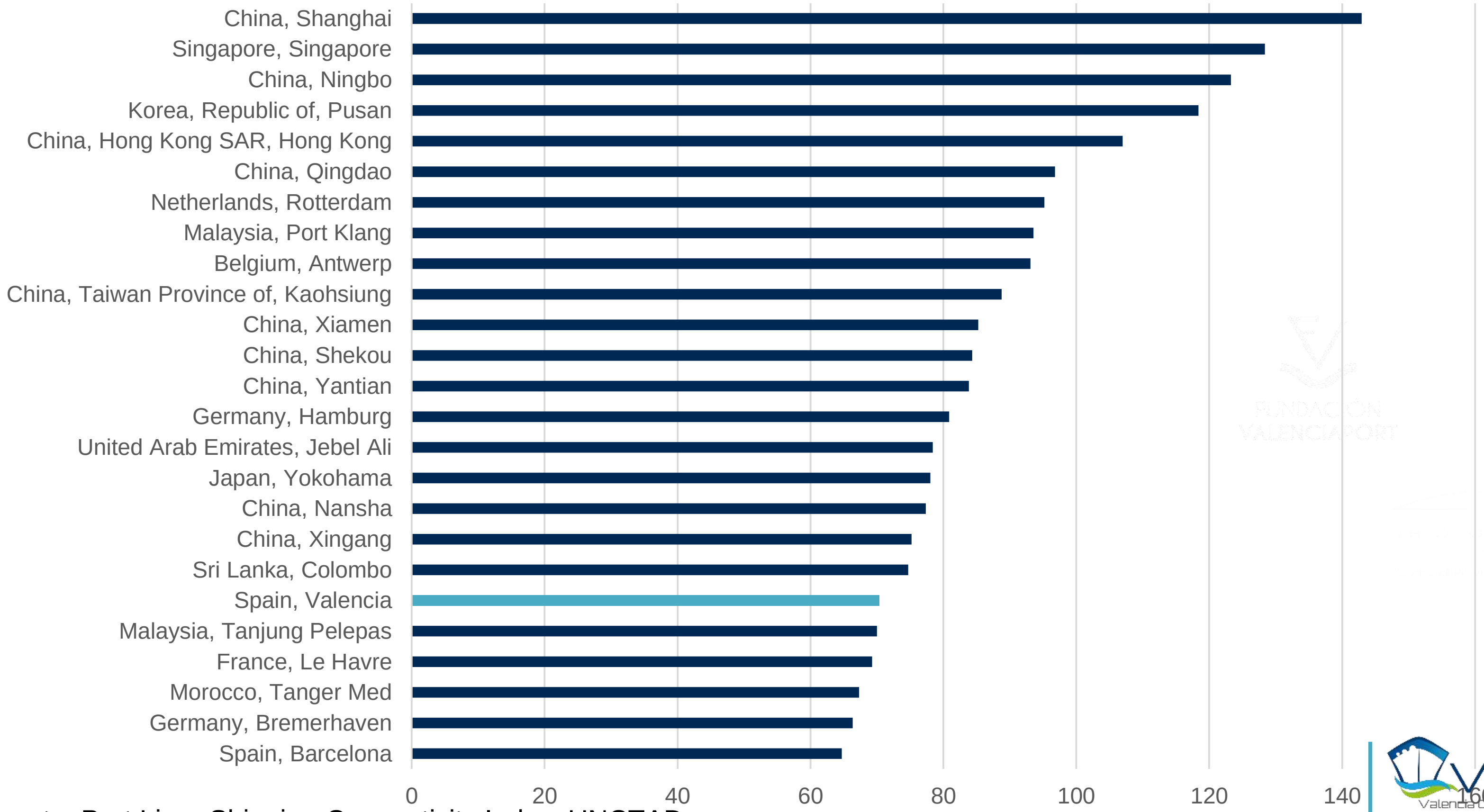
Índice de Conectividad Portuaria 2.0

Índice de Conectividad Portuaria de Valenciaport

PUERTO ORIGEN	ICP 1er Semestre 2016	ICP 2ndo Semestre 2016	ICP 1er Semestre 2017	ICP 2ndo Semestre 2017	ICP 1er Semestre 2018	ICP 2ndo Semestre 2018	ICP 1er Semestre 2019	ICP 2ndo Semestre 2019	ICP 1er Semestre 2020	ICP 2ndo Semestre 2020
VALENCIAPORT	100,00	95,47	98,89	102,19	102,12	97,31	100,76	102,47	102,36	101,09
ALGECIRAS	75,26	78,44	87,64	88,75	85,86	83,85	92,14	93,20	96,33	94,46
BARCELONA	76,91	73,20	84,03	84,94	89,42	83,57	84,88	83,99	78,94	78,57
LAS PALMAS GC	26,42	26,89	26,94	27,98	29,54	29,55	27,75	28,80	27,18	29,11
CASTELLÓN	26,63	24,10	31,88	28,37	29,55	29,45	31,42	31,88	29,57	28,35
VIGO	18,74	16,70	15,78	18,43	19,65	20,48	20,36	17,44	18,28	19,11
BILBAO	23,67	16,86	18,44	18,75	20,15	18,96	18,99	18,94	18,16	15,03
TARRAGONA	12,38	13,40	15,71	14,95	11,33	11,58	14,54	11,19	10,74	10,84
GIJÓN	12,82	6,15	9,15	9,24	11,91	12,87	10,89	11,31	11,45	10,10
TENERIFE	7,90	8,59	9,71	14,87	11,53	10,87	9,42	8,36	7,58	9,74

Fuente: APV, FV

Índice de Conectividad Portuaria 2.0



Fuente: Port Liner Shipping Connectivity Index, UNCTAD

Índice de Conectividad Portuaria 2.0 – VALENCIAPORT ICP 2.0

Variables

- Tradicionales: servicios, frecuencia, puertos, buques, tamaños, navieras
- Alternativas: tiempo de tránsito, conexiones intermedias, alternativas transbordo
- Extendidas: hinterland, FF.CC, conexiones terrestres, infraestructuras, localización, terminales

¿Todas las variables tienen la misma relevancia?

Metodología

** 1 Naviera + 50 puertos vs 50 Navieras + 1 puerto*

Índice de Conectividad Portuaria 2.0 – VALENCIAPORT ICP 2.0

Variables incluidas:

- **Frecuencia servicios marítimos**
- **Capacidad ofertada**
- **Nº puertos de destino**

	Variables		
	Capacidad	**Puertos destino**	**Frecuencia**
Peso variables	0,0007	0,0031	0,0061
% sobre el total	6,91%	31,48%	61,61%

Variables descartadas:

- **Nº navieras**: variable que mide la competencia de operadores en el puerto (UNCTAD, 2004).
- **Nº líneas**: elevada correlación con la frecuencia de servicios marítimos

Metodología BoD-DEA-CSW

BoD - DEA

Benefit of the Doubt (BoD) equivale a determinar el peso de cada una de las variables considerando solamente los outputs producidos e ignorando los inputs.

Data Envelopment Analysis (DEA) plantea un problema de programación matemática para cada puerto

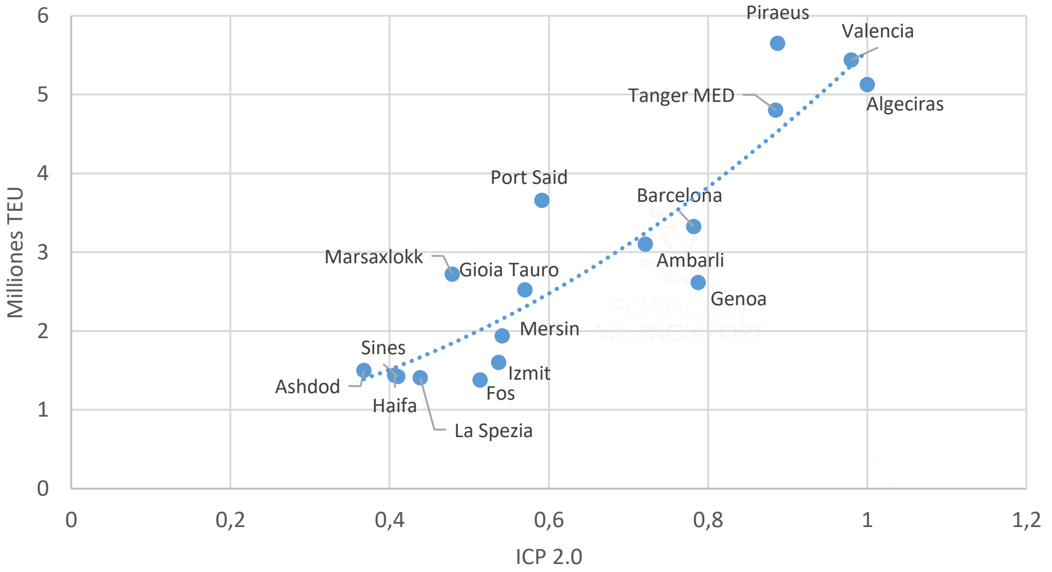
Inconveniente: cada variable puede tener un peso distinto en cada puerto, por lo que dificulta su comparación.

CSW

Ventaja: todas la unidades se evalúan con los mismos pesos y proporciona una visión más "exacta" del comportamiento general de las DMU.

Índice de Conectividad Portuaria 2.0 – VALENCIAPORT ICP 2.0

Ranking	Puertos	ICP 2.0
1	Algeciras	1,0000
2	Valencia	0,9799
3	Pireo	0,8874
4	Tanger MED	0,8852
5	Genoa	0,7876
6	Barcelona	0,7819
7	Ambarli	0,7211
8	Port Said	0,5915
9	Gioia Tauro	0,5699
10	Mersin	0,5414
11	Izmit	0,5371
12	Fos	0,5137
13	Marsaxlokk	0,4786
14	La Spezia	0,4384
15	Sines	0,4103
16	Haifa	0,4061
17	Ashdod	0,3676



Índice de Conectividad Portuaria 2.0 – VALENCIAPORT ICP 2.0

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Discusión de la propuesta metodológica

Aumento de la muestra (más puertos, más años)

Inclusión de elementos cualitativos (navieras, tiempo de tránsito,nivel de servicio, infraestructuras)

Ánalisis de conectividad del hinterland

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ICP Índice de Conectividad Portuaria

Muchas gracias por su atención,
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