Emerging Maritime Nations (I)

VIETNAM

February 2007
Including updates through August 2007
PART I

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The Dynamar Emerging Maritime Nations series

Since 2004 Dynamar has been publishing reports on specific container liner trades such as the Transatlantic (North Europe-North America) and Far East-Europe to name but a few. In essence these off-the-shelf consultancy studies portray a trade from the viewpoint of a carrier that:

- may consider entering the trade lane under review
- or already serves the route and needs to keep track of the latest developments

This explains the basis of these studies that in particular aim at providing:

- An assessment of the size of the trade (volume in terms of full containers)
- An in-depth competition inventory (services, ships, capacity analyses)

The format of these reports is based upon a proven concept of splitting the publication into two modules, part one containing the summary information, part two the supporting and/or detailed (statistical) information.

For the Emerging Maritime Nations series, instead of considering a particular trade lane, Dynamar has taken the above concept and concentrated it upon, in this case, the Vietnam container liner trades. For this, and subsequent, studies, Dynamar will highlight the various factors that affect a hitherto relatively little known trade, but one with the potential for substantial growth.

As such, Vietnam is the perfect start. Increasing amounts of copy have been written about Vietnam as its economy has grown significantly and the country has developed into an alternative choice for manufacturers. Its entry into the World Trade Organisation has fuelled such reporting and the chances for a near explosion in trade growth, if China is anything to go by, are real and likely to come about.

Its potential notwithstanding, Vietnam is still not on the schedules of the major East-West services connecting the Far East with Europe or the USA, and its port, not to forget inland, infrastructure is in need of development. Although time and space has dictated that some of the factors affecting Vietnam's liner and overall maritime industry have not been discussed in as much depth as could have been, this study develops along the following lines:

Part I:

Essentially examining the opportunities for development and growth, essentially why this is an “Emerging Maritime Nation”:

- General overview:
  - Executive summary of the report’s findings through key facts and figures (number of carriers, services, total volume, total capacity, major ports)
  - Introduction to the trade that briefly highlights the salient points and a general outline of the trade under study; its recent history, development and current situation
- Summary of the ports of call in Vietnam and those with which it is directly connected by the container liner services under review
- Vietnam’s container trade statistics (graphs)
  - Growth of total port throughput
  - Major container trading partnerships
  - Major container trade handling regions in Vietnam
- Vietnam’s economic development and investment coming in from outside
- Its (general) international trade development and relationships, including membership of the WTO and other organisations and important trading partners
- Commodities imported and exported (concentrating on the latter) with latest available figures, expectations and major shippers where known
- Current annual container liner trade capacity as a whole followed by an analysis separated by individual carrier
- Overview of all full container services provided by the carriers, presented in grid format
- Current port projects (to be) undertaken in order to meet cargo and shipping demand, including a review of the major transhipment port development in Van Phong Bay
- Major developments related to Vietnam as a maritime nation from 2004 through to end 2006
- Post publication developments (i.e. post January 2007)

Much of the above is illustrated in graph and/or table form. Part II presents fuller statistics and more detailed information for reference

Part II:

- Container throughput of Vietnam’s ports, separated by port
- Full container trade statistics for along the Vietnam-Europe/Mediterranean and Vietnam-USA trade lanes
- Vietnam’s economic development at both constant and current 1994 prices, 1995-2005
- Vietnam’s international trade in goods, detail, by value (imports, exports, deficit/surplus, growth)
- Full list of import and export commodities, by value
- Development of industrial production by units produced or value
- Current significant Vietnam container port profiles with (where known):
  o Location and address
  o Port capabilities
  o Statistics
  o Development projects
- Detailed list of every container liner service including:
  o Operating partners
  o Port rotation
  o Frequency
  o Vessels deployed
  o Relevant notes
- Vietnam trades related profiles of all carriers involved as vessel operators including (where known):
  o (Own) Office locations
  o Local joint venture partners
  o Experience (when entered) in the trade
  o Summary of service provision, including slot allocations
- Development of exchange rate between Vietnam Dong and US Dollar
- Endnotes (sources) to particular chapters

This wide range of factors and subjects make these reports also of particular interest to other stakeholders in the trade areas, including (alphabetically): consultants, container lessors, financiers, forwarders, NVOCCs, port authorities, port developers, shippers, terminal operators, training institutes and others.

It should be noted that Dynamar is generally able to customise each report to the specific terms of reference of the interested party.

We trust that you find the following pages of use and interest and as always, welcome any comments or feedback you may have.

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