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Euro Asian Transport Linkages (EATL)



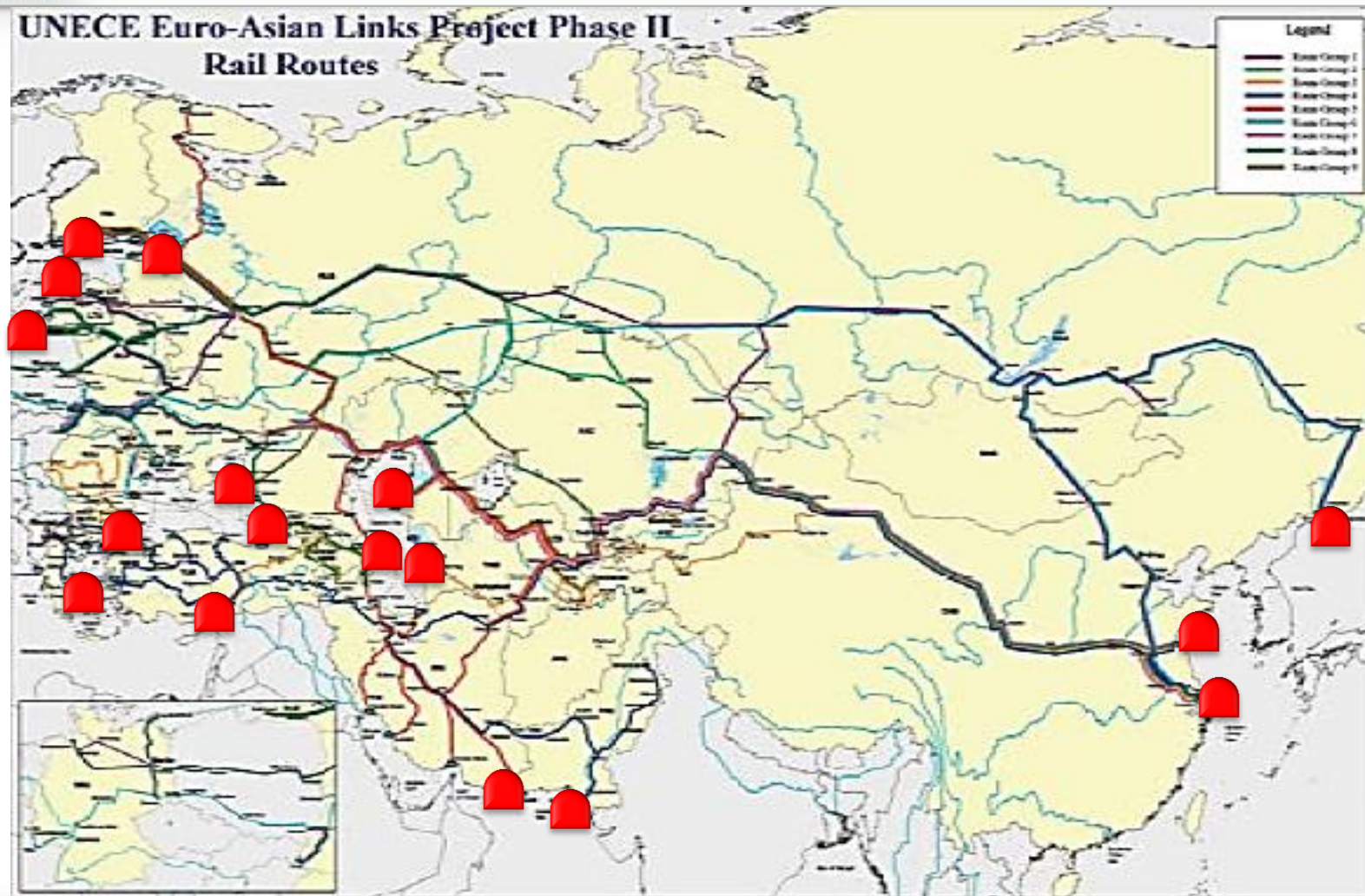
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UNECE Euro-Asian Links Project Phase II Rail Routes



Flows of goods, services, and finance reached **\$26 trillion** in 2012, or **36 percent** of global GDP, 1.5 times the level in 1990. Now, one in three goods crosses national borders, and more than one-third of financial investments are international transactions. In the next decade, global flows could triple, powered by rising prosperity and participation in the emerging world and by the spread of the Internet and digital technologies.

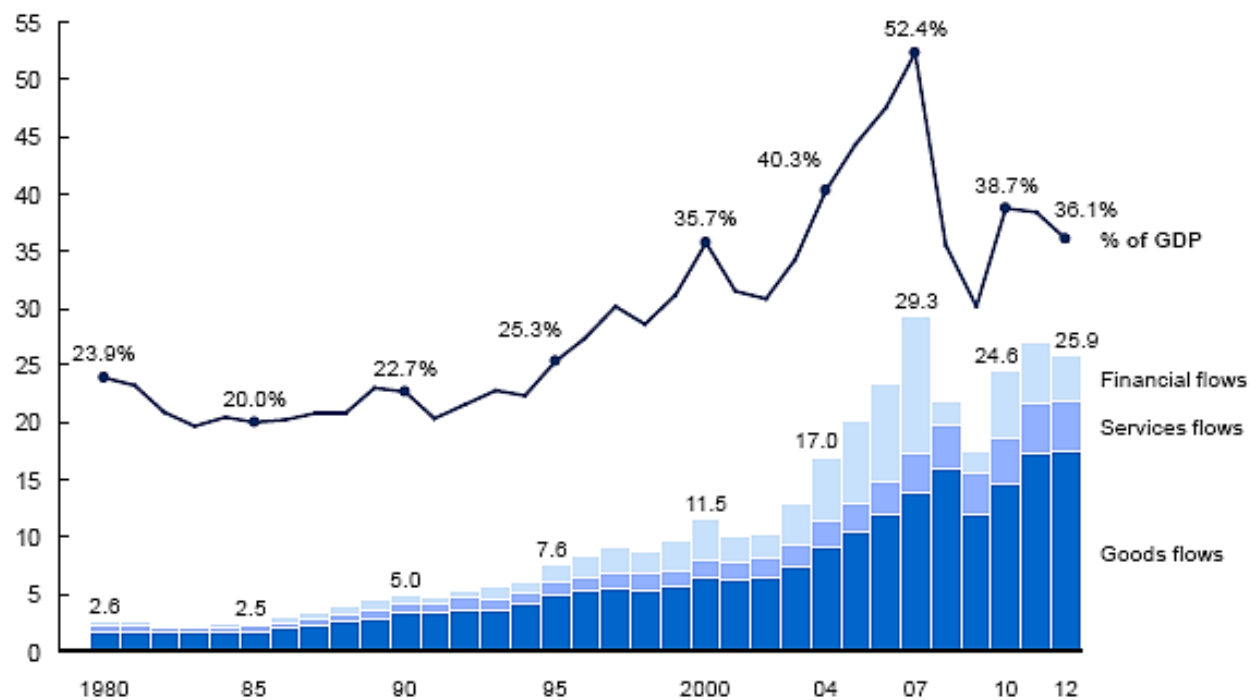
McKinsey Global Institute (MGI) report



Traditional flows of goods, services, and finance reached \$25.9 trillion in 2012

Goods, services, and financial flows; share of GDP, 1980–2012

\$ trillion, nominal; %



SOURCE: Comtrade; IMF Balance of Payments; World Trade Organization; McKinsey Global Institute analysis

MGI Connectedness Index

Country connectedness index and overall flows data, 2012¹

Rank of participation by flow as measured by flow intensity and share of world total

Economy		Connectivity Index Rank					Flow intensity ²			Change in flow intensity, 1995–2012 %
Developed	Emerging	1–10	11–25	26–50	51+	100+	70–99	<70		
Rank	Country	Change in rank, 1995–2012 ³	Goods	Services	Financial	People (2010)	Data and communication (2013)	Flows value ⁴ \$ billion	Flow intensity %	
1	Germany	1	3	5	7	5	2	3,770	110	+53
2	Hong Kong, China		1	4	3	14		1,437	548	
6	Netherlands	2	6	7	15	29	1	1,213	157	+39
7	France	-1	9	10	38	15	4	1,581	80	+8
9	Russia		19	30	16	2	21	1,277	83	
11	Belgium		4	8	30	39	11	937	194	
13	Switzerland	-1	23	16	11	28	17	851	135	+64
19	Poland	5	22	31	28	34	22	478	98	+41
21	Austria	-10	24	17	62	33	9	424	107	+22
25	China	6	5	21	6	93	33	5,124	82	+8
27	Turkey	-1	30	43	32	31	31	524	86	+14
30	India	16	27	13	28	47	64	1,131	81	+37
35	Greece	-2	59	27	44	27	41	265	106	+65
85	Pakistan	-30	68	81	117	61	79	78	35	-8



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Value of cross-border flows between regions

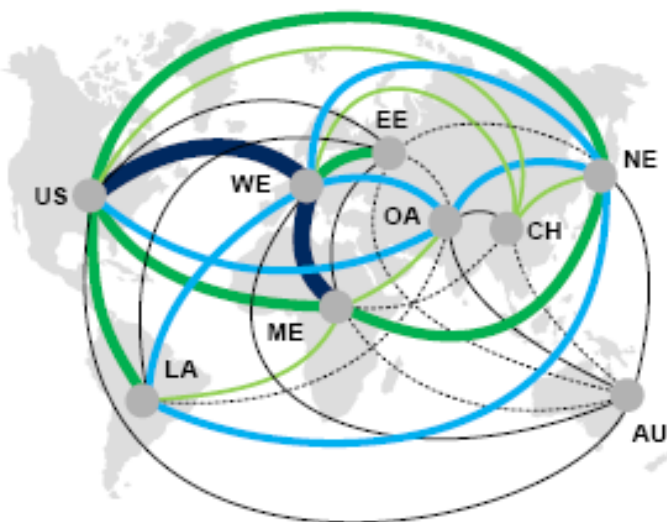
● Size of increase

Regions	US	LA	ME	WE	EE	CH	NE	AU	OA
	United States and Canada	Latin America	Africa and Middle East	Western Europe	Eastern Europe and Central Asia	China region	Northeast Asia	Australasia	Other Asia

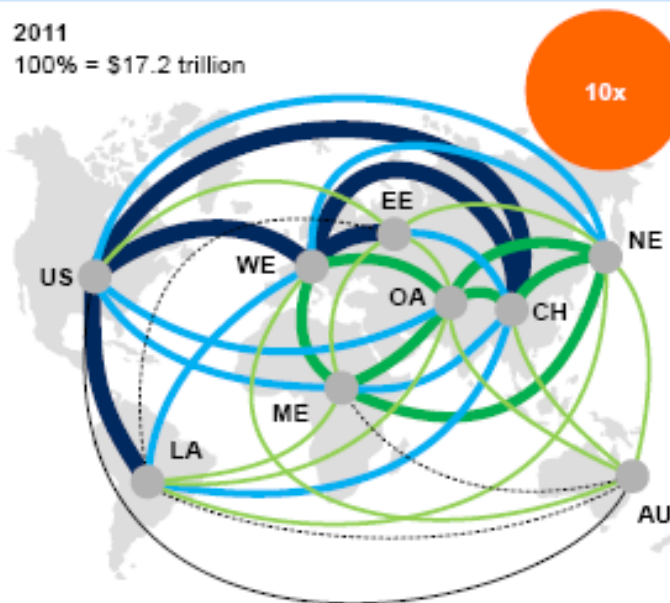
% of global GDP — 0.02–0.05 — 0.05–0.10 — 0.10–0.25 — 0.25–0.50 — 0.50–1.00 — >1.00

Goods flows

1980
100% = \$1.8 trillion



2011
100% = \$17.2 trillion



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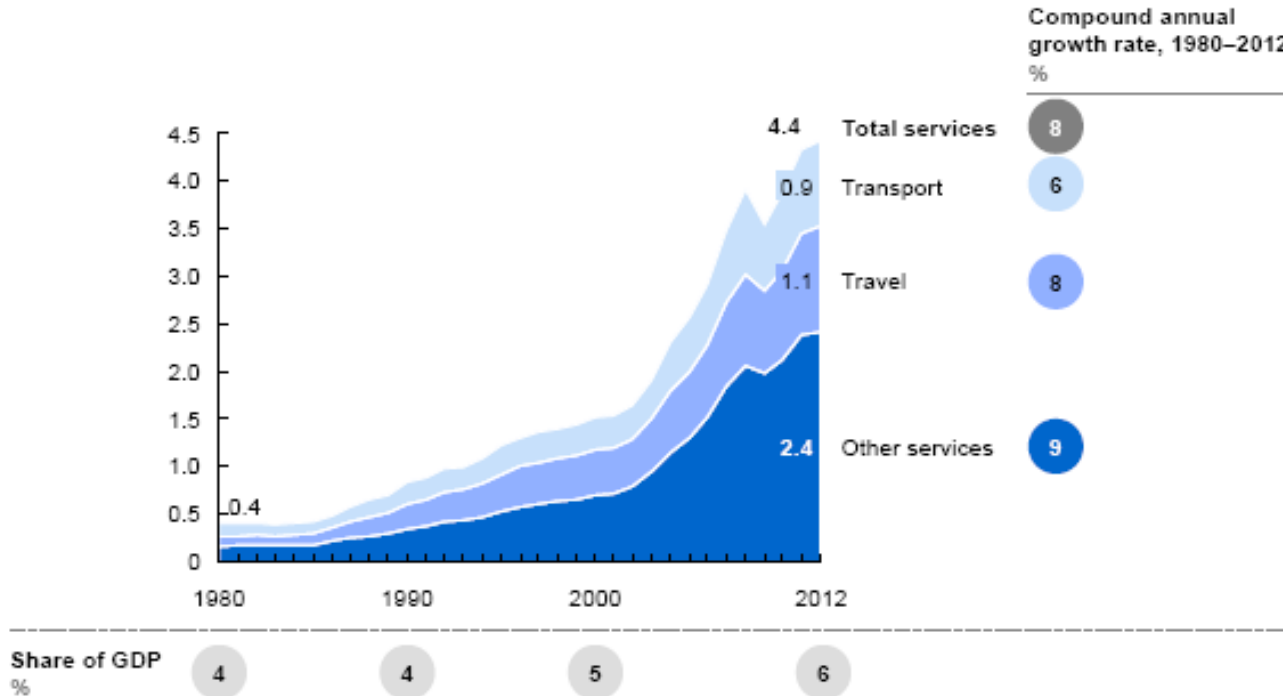


Trade in services is dwarfed by the flow of goods and is growing at about the same pace

Services trade has increased in both value and share of GDP since 1980

Growth of services trade over time

\$ trillion, nominal values



SOURCE: UNCTAD; World Development Indicators, World Bank; McKinsey Global Institute analysis



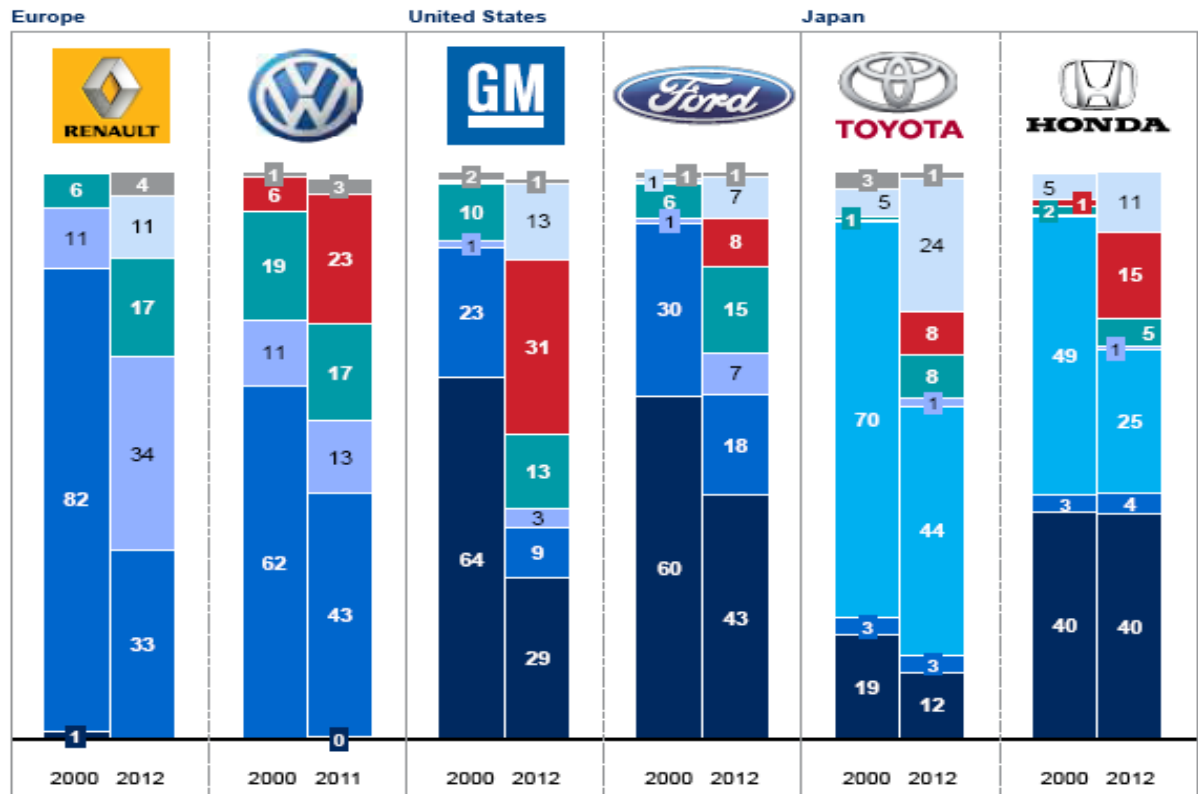


Consumption and production of manufactured goods is expanding in emerging markets

Automotive companies are increasing their production footprint in emerging markets

Selected automotive original equipment manufacturer production by region
% of total production (units)

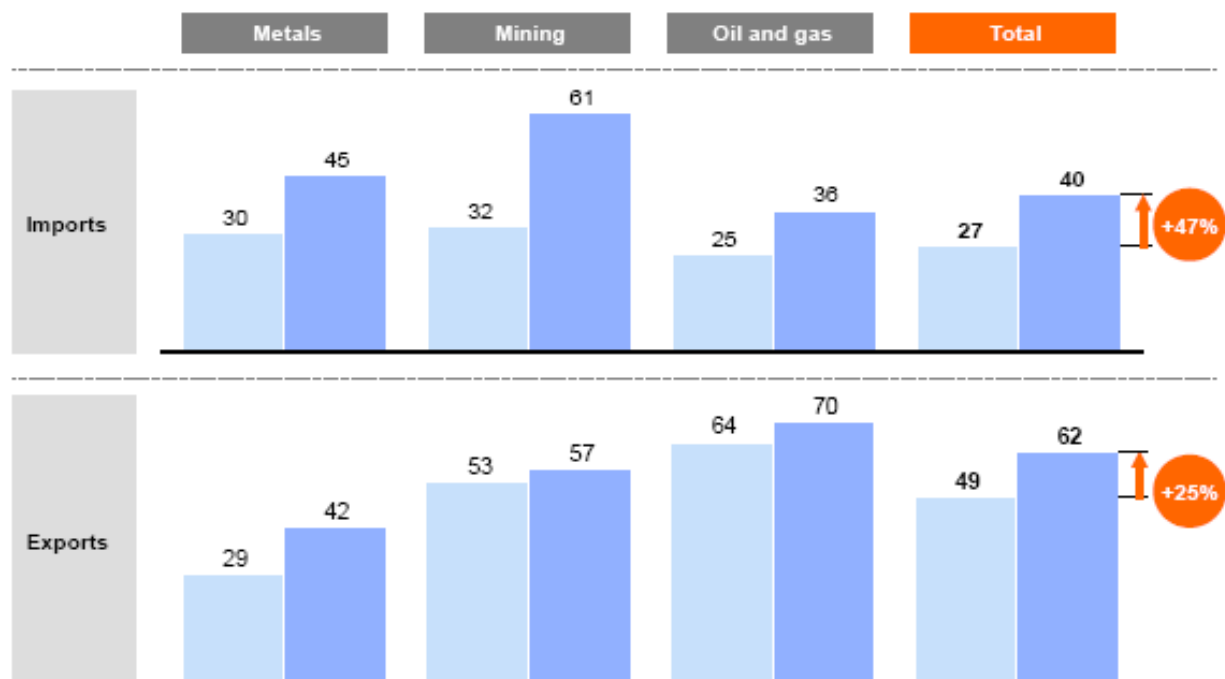
Rest of the world Other Asia China Latin America Eastern Europe¹ Japan Western Europe United States and Canada



The emerging-market share of natural-resource flows has increased significantly over the past decade, especially in imports

Emerging-market share of flows by value, 2002 vs. 2012

%



NOTE: Numbers may not sum due to rounding.

SOURCE: Comtrade; McKinsey Global Institute analysis

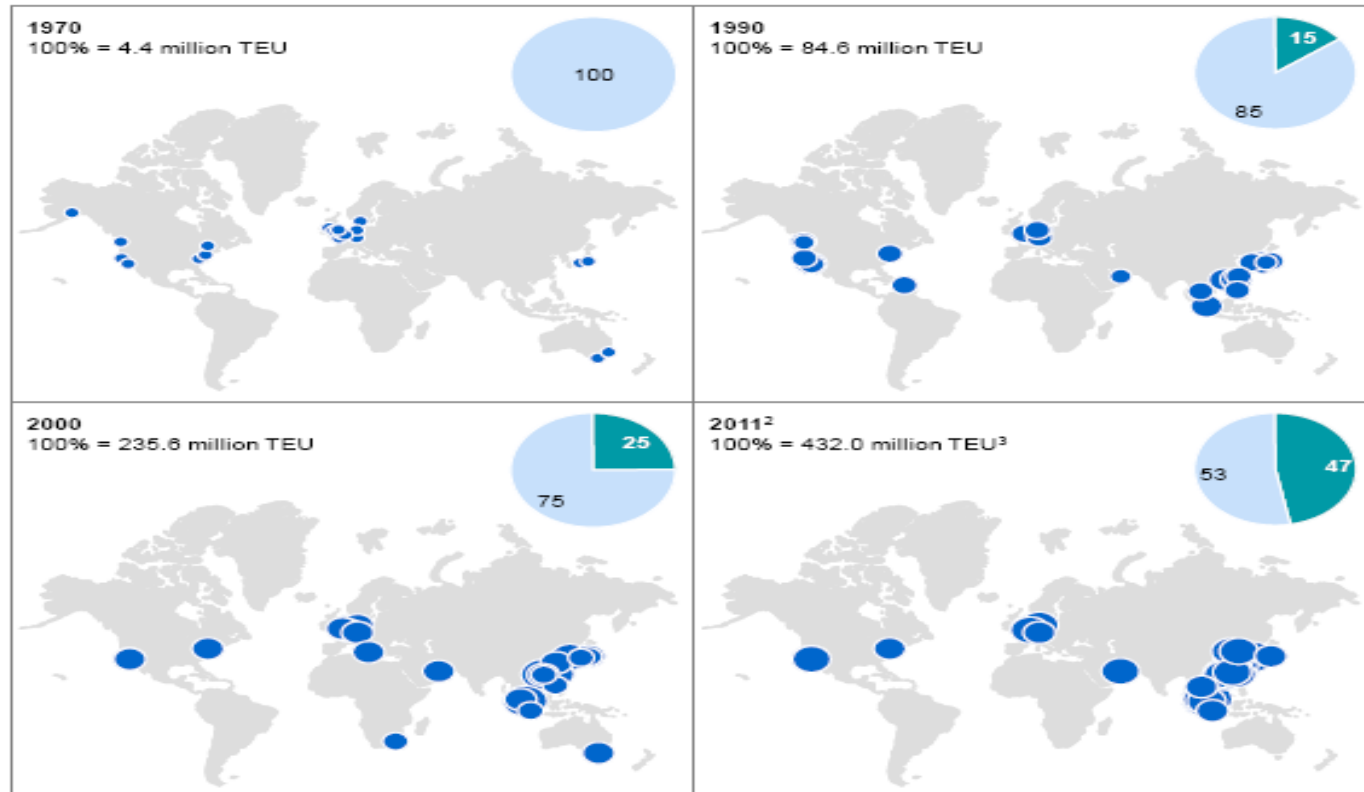
Led by Asia, emerging-economy ports have increased their share of world shipping since 1970

Top 25 ports each year; share of volume shipped by top 25 ports (%)

Container TEU¹ Million

- <350
- 351–1,000
- 1,000–6,000
- 6,001–15,000
- 15,001–25,000
- >26,000

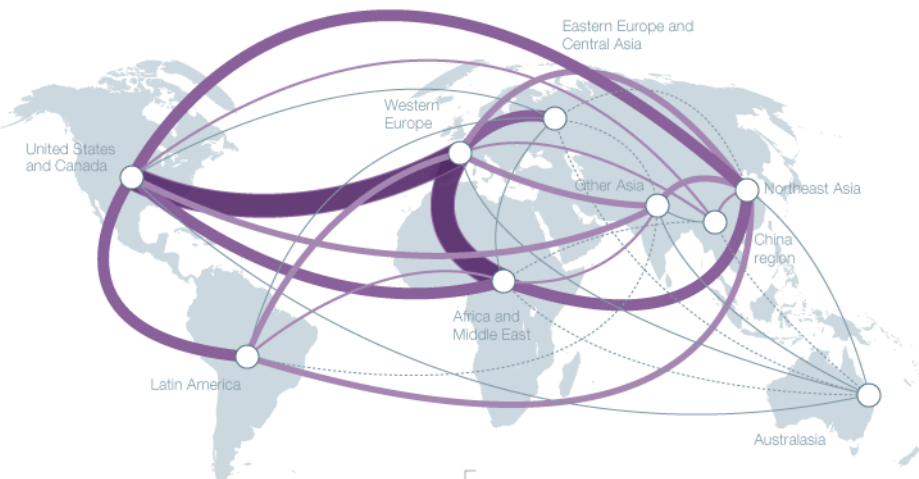
■ Emerging
■ Developed



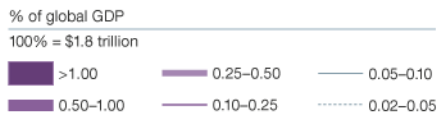


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Flow of goods in 1980

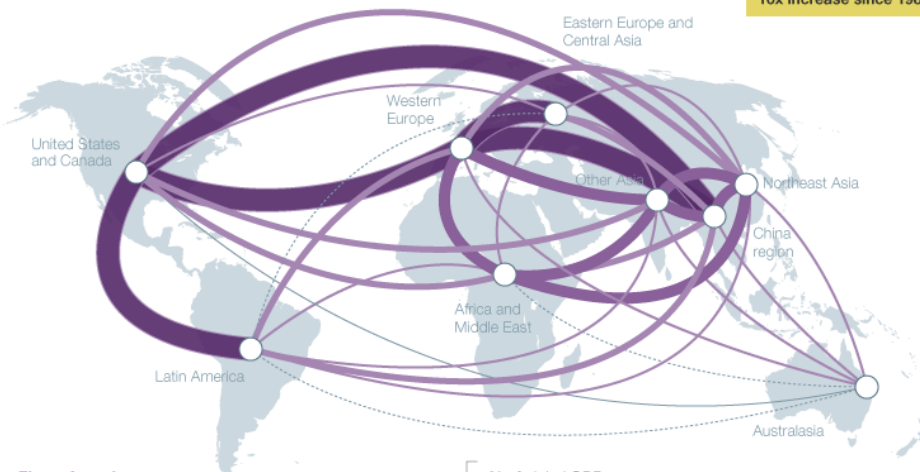


Flow of goods
Flow of services
Flow of finance
Flow of people
Flow of data and communication

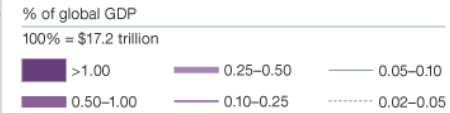


Flow of goods in 2011

10x increase since 1980



Flow of goods
Flow of services
Flow of finance
Flow of people
Flow of data and communication



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Thank You!

