

4. LANDLOCKED COUNTRIES

4.1 The special situation of landlocked countries

The maritime trading system has played a vital role in the economic development of the ESCAP region, but twelve of ESCAP's member countries have no direct access to the sea. Four of these — Afghanistan, Bhutan, the Lao People's Democratic Republic and Nepal — are amongst the least developed countries of Asia. Armenia, Azerbaijan, Kazakhstan, Kyrgyzstan, Mongolia, Tajikistan, Turkmenistan and Uzbekistan are classified as 'economies in transition'.

The disadvantages countries suffer from the lack of maritime access is well-recognised: "Each of these landlocked countries is disadvantaged by its lack of access to and distance from the sea. Dependence on a limited number of commodities for their export earnings, lack of territorial access to the sea, and remoteness from world markets make landlocked developing countries as a group among the poorest of developing countries" (UNESCAP, 2007)

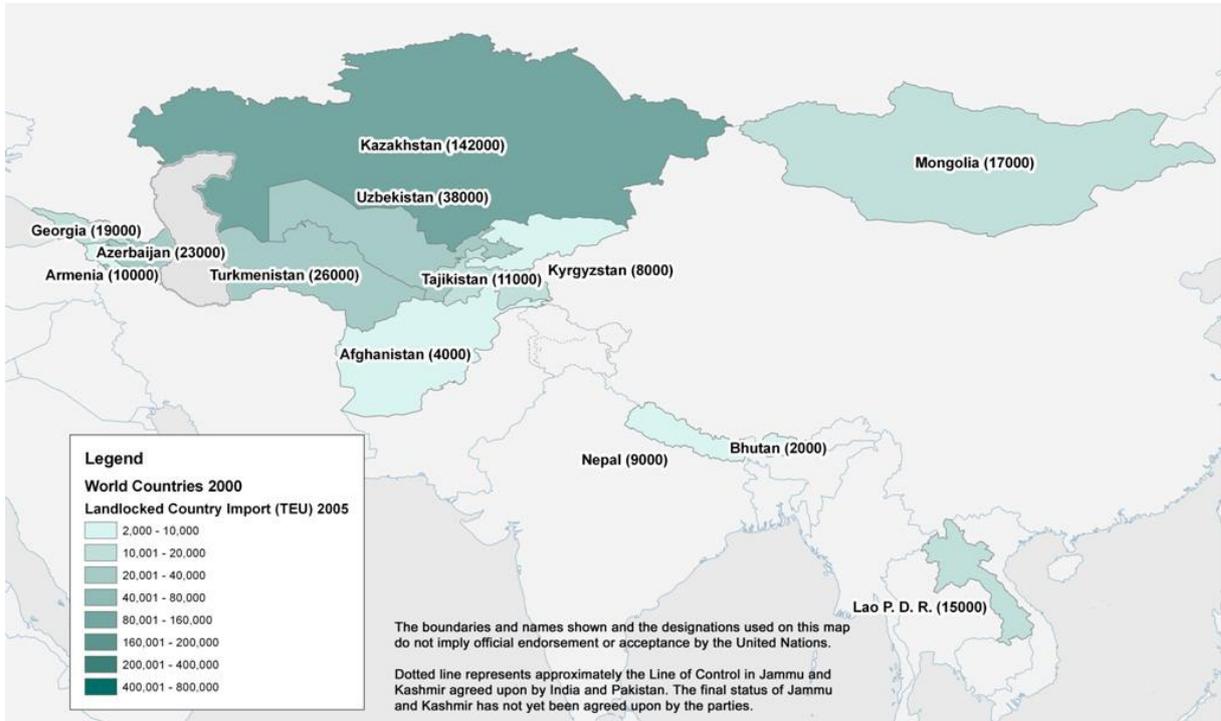
Considerable progress has been made since that time in negotiating cross-border and transit agreements, and in developing the road and rail infrastructure that will allow the landlocked countries of the ESCAP region to be fully integrated into the global trading system. However, much still remains to be done.

4.2 Estimated future container volumes of ESCAP landlocked countries

Estimation of future volumes of containers moving to and from landlocked countries is made particularly difficult by the lack of reliable time series data on past and present container movements. Whereas port statistics provide a readily available and usually accurate source of data for maritime countries, there is no equivalent source for cross-border movements of container cargoes to and from landlocked countries.

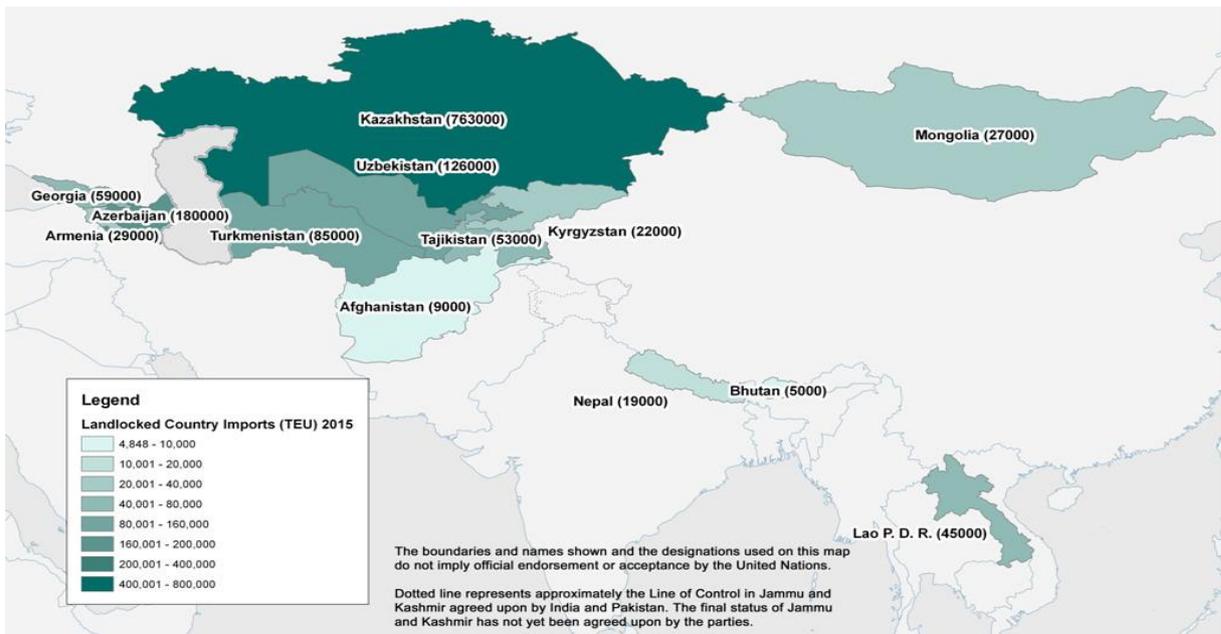
This lack of reliable baseline data means that the regression approach usually employed in MPPM studies to produce estimates of future container flows was not viable in these cases. Instead, estimates were made inferentially, combining the limited available data with benchmarks for countries with similar levels of population and economic development. The resulting estimates are presented in Figures 4-1 to 4-4 below.

FIGURE 4-1: LANDLOCKED COUNTRY IMPORTS - 2005



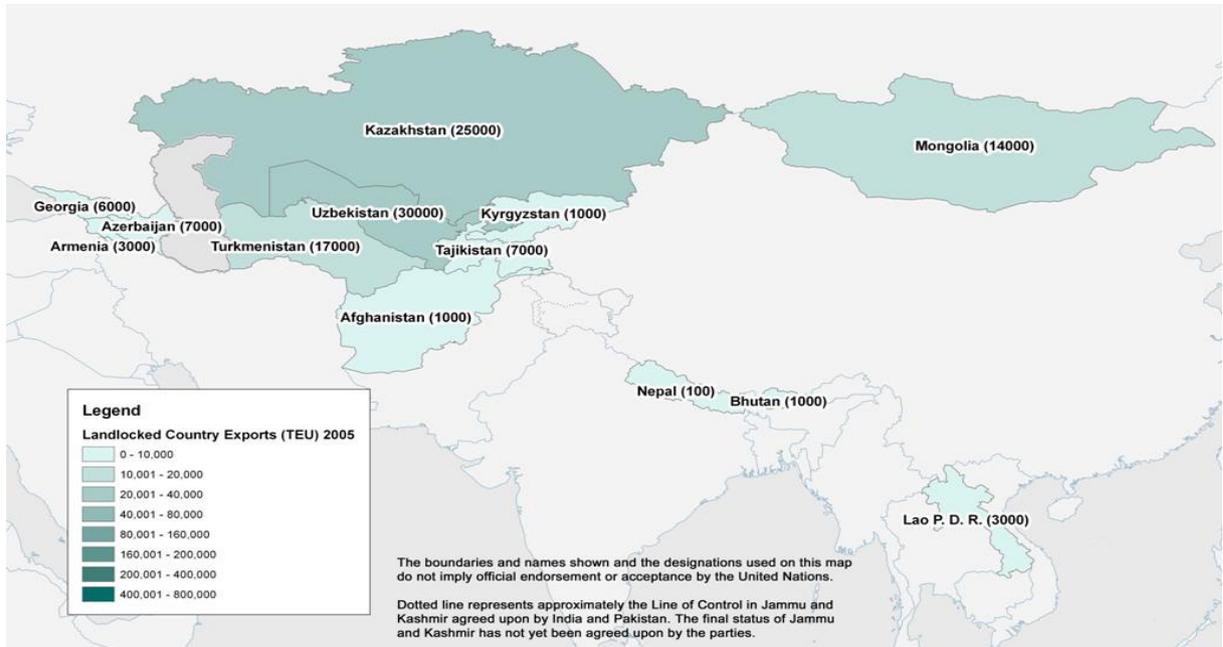
(Source: Study estimates)

FIGURE 4-2: LANDLOCKED COUNTRY IMPORTS - 2015



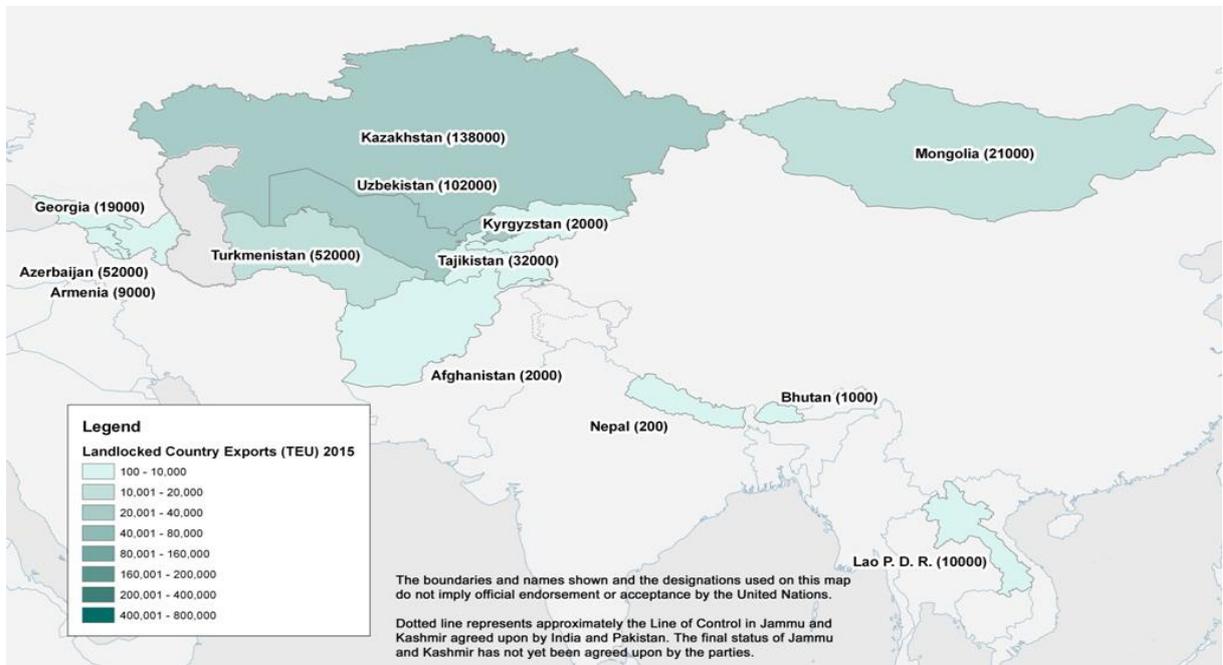
(Source: Study estimates)

FIGURE 4-3: LANDLOCKED COUNTRY EXPORTS – 2005



(Source: Study estimates)

FIGURE 4-4: LANDLOCKED COUNTRY EXPORTS - 2015



(Source: Study estimates)