

**FONDAZIONE
ECONOMIA
TOR VERGATA**



**Economia Istituzioni
Sviluppo Tecnologico**



Aspetti economici, politici e sociali dell'area del Mekong

INDIAN OCEAN

1. Aspetti economici generali dell'area Mekong

La *Greater Mekong Subregion (GMS)* è un'area economica che comprende i paesi sulle sponde del fiume Mekong e sono: Cambogia, Repubblica Popolare Cinese (in particolare la provincia di Yunnan e la regione autonoma di Guangxi Zhuang), Laos, Vietnam, Thailandia, Myanmar la cui superficie complessiva è di 2.6 chilometri quadrati ed una popolazione di 334 milioni di abitanti nel 2013.

Tabella 1: Popolazione 2013

Population	Population density (people per sq. km of land area)	Rural population (% of total population)	Urban population (% of total)	Urban population growth (annual %)	Rural population growth (annual %)
Country/Year	2013	2013	2013	2013	2013
Cambodia	85.7	79.7	20.3	2.7	1.6
China	144.6	46.8	53.2	2.9	-2.2
Lao PDR	29.3	63.5	36.5	4.9	0.1
Myanmar	81.5	67.0	33.0	2.5	0.1
Thailand	131.2	52.1	47.9	3.0	-2.1
Vietnam	289.3	67.7	32.3	3.1	0.1

Fonte: ns elaborazione su dati ADB

I dati del GDP espressi in termini di parità di potere d'acquisto evidenziano un andamento crescente per il periodo 2001-2013 sia per l'intera area del Mekong sia per i singoli paesi che ve ne fanno parte. In particolare, i valori maggiori in termini assoluti riguardano la Thailandia e il Vietnam che coprono oltre il 50% del totale del GDP.

Tabella 2: Gross domestic product at PPP 2001-2013 (dollar, billion)

	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
GMS	893.4	975.5	1076.6	1182.4	1324.1	1462.6	1620.5	1748.4	1808.2	1915.4	2060.0	2300.0	2449.3
Cambodia	14.6	15.9	17.6	19.9	23.3	26.6	30.1	32.7	33.0	35.4	38.7	42.2	45.7
Guangxi,PRC	83.6	92.8	102.6	119.9	137.2	159.8	192.0	218.4	240.6	232.8	273.0	327.4	359.4
Yunnan,PRC	78.4	85.0	92.9	107.6	119.2	134.3	157.4	177.0	191.3	185.1	206.1	248.4	284.2
Lao PDR	10.3	11.2	12.2	13.4	14.7	16.5	18.3	20.1	21.7	23.4	26.2	27.8	30.9
Myanmar	51.2	58.3	67.6	78.9	92.5	107.8	124.0	139.4	155.3	170.4	197.2	217.9	...
Thailand	480.6	522.5	575.8	631.3	681.4	735.7	788.8	826.8	811.6	886.1	904.5	992.3	1036.2
Viet Nam	174.7	189.9	207.9	211.4	255.7	281.9	310.0	334.0	354.7	382.1	414.3	443.9	474.9

Fonte: ns elaborazione su dati ADB

Il trend di crescita dell'area del Mekong è confermato anche dal GDP pro capite espresso in termini di parità del potere d'acquisto ma per questi valori si evidenzia una riduzione delle differenze in valore tra i

singoli paesi. La Thailandia è il paese che registra il valore più elevato, mentre il valore più basso la Cambogia e rispettivamente il doppio e la metà dell'area del Mekong.

Tabella 3: Gross Domestic Product Per Capita at PPP (dollar, billion)

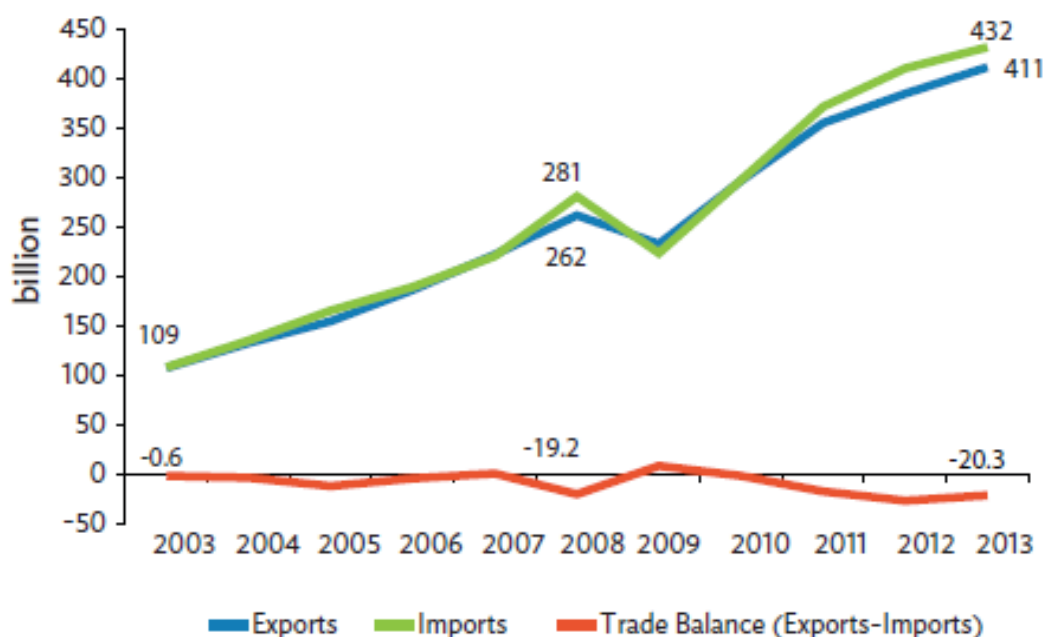
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
GMS	2973.6	3210.4	3504.0	3806.5	4251.8	4642.3	5081.7	5427.8	5560.6	5887.9	6278.6	6949.7	7335.2
Cambodia	1156.8	1239.5	1353.5	1514.2	1746.5	1967.6	2196.6	2357.9	2341.7	2472.9	2661.7	2854.7	3046.6
Guangxi,PRC	1745.1	1923.5	2112.1	2452.1	2945.1	3386.4	4026.9	4534.5	4954.6	5049.8	5876.3	6992.7	7614.2
Yunnan,PRC	1828.2	1961.7	2124.0	2437.3	2679.7	2995.3	3485.9	3897.2	4185.3	4022.8	4449.6	5331.9	6060.6
Lao PDR	1991.6	2118.3	2249.4	2424.6	2619.2	2869.2	3110.6	3343.8	3551.0	3746.3	4110.0	4274.0	4609.4
Myanmar	1001.6	1116.7	1271.0	1453.7	1670.2	1908.1	2156.3	2387.6	2625.6	2851.2	3266.5	3573.8	—
Thailand	7677.3	8298.6	9092.8	9913.4	10637.9	11420.3	12173.7	12688.0	12382.4	13442.1	13660.5	14924.0	15522.6
Viet Nam	2236.1	2401.9	2599.2	2611.2	3121.0	3402.5	3681.3	3924.1	4123.4	4395.5	4717.0	5000.4	5294.3

Fonte: ns elaborazione su dati ADB

1.2 Bilancia commerciale e Foreign Direct Investment (FDI)

I dati del commercio estero evidenziano valori piuttosto modesti in termini assoluti e crescenti per il periodo 2003-2013, registrano una lieve flessione negli anni 2008 e 2009. I valori dell'export e dell'import registrano un livello di parità del saldo della bilancia commerciale dell'area del Mekong lungo tutto il periodo considerato, con leggeri deficit negli anni 2008, 2012 e 2013.

Grafico 1: Bilancia commerciale dell'area Mekong 2003-2013 (dollar, billion)



Fonte: ns elaborazione su dati ADB

I dati di import ed export disaggregati per ciascun paese del Mekong, mostrano che le attività di commercio della Thailandia sono superiori al 50% del totale commercio. Cambodia, Guangxi, Yunnan, hanno una situazione di surplus della bilancia commerciale mentre Lao PDR, Myanmar, Thailandia hanno una situazione di deficit della bilancia commerciale.

Tabella 4: Totale esportazioni (dollar, million)

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
GMS	108,307	133,274	155,345	186,953	222,615	262,028	233,281	296,928	355,189	384,751	411,406
Cambodia	2,087	2,589	2,908	3,692	3,248	3,493	3,148	3,939	5,035	5,633	6,530
Guangxi, PRC	1,777	2,386	2,877	3,593	5,109	7,347	8,375	9,603	12,458	15,468	18,693
Yunnan, PRC	1,470	2,239	2,642	3,391	4,768	4,984	4,513	7,606	9,472	10,017	15,671
Lao PDR	336	363	553	882	923	1,092	1,053	1,746	2,190	2,271	2,264
Myanmar	2,324	2,906	3,558	5,233	6,402	6,779	7,587	8,861	9,136	8,977	11,204
Thailand	80,165	96,307	110,360	130,336	153,604	175,647	151,509	192,937	219,994	227,857	224,908
Viet Nam	20,149	26,485	32,447	39,826	48,561	62,685	57,096	72,237	96,906	114,529	132,135

Fonte: ns elaborazione su dati ADB

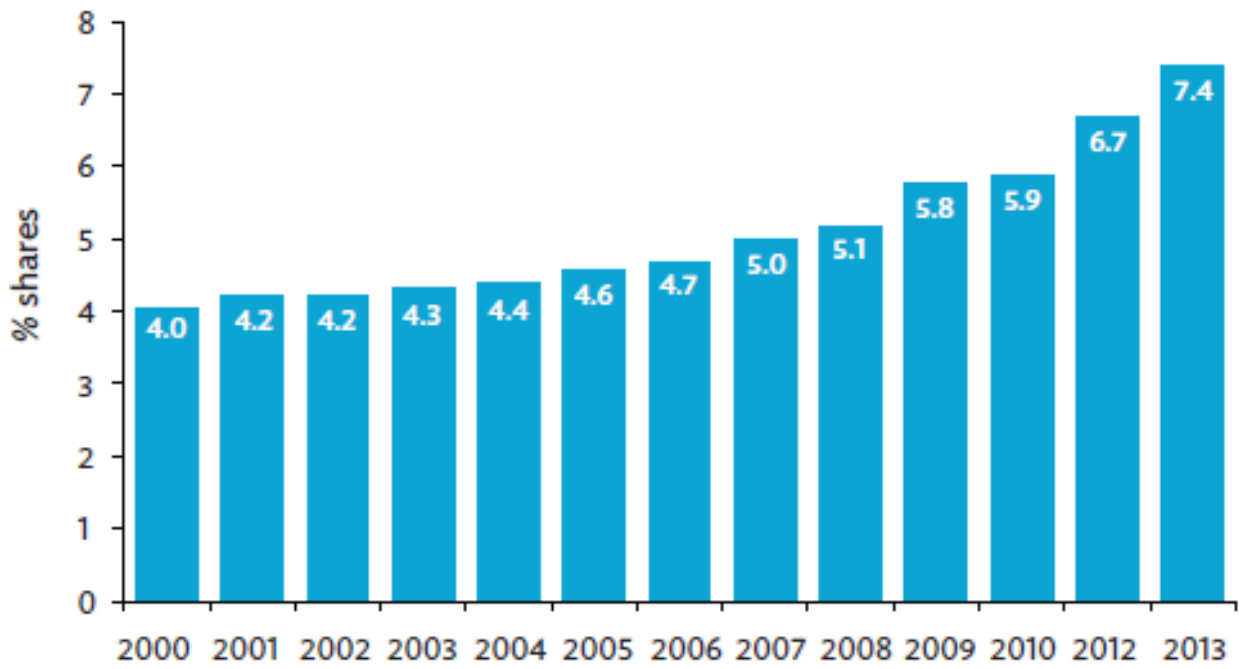
Tabella 5: Totale importazioni (dollar, million)

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
GMS	108,947	135,820	166,152	190,049	220,966	281,220	223,854	297,608	371,585	410,366	431,685
Cambodia	2,668	3,269	3,918	4,771	4,517	5,077	4,625	5,502	6,937	8,088	9,489
Guangxi, PRC	1,445	1,892	2,305	3,075	4,150	5,889	5,879	8,136	10,898	14,017	14,134
Yunnan, PRC	1,250	1,503	2,102	2,833	4,025	4,613	3,534	5,824	6,556	10,996	9,632
Lao PDR	462	713	882	1,060	1,065	1,403	1,461	2,060	2,404	3,055	3,020
Myanmar	2,205	1,973	1,984	2,937	3,353	4,543	4,181	6,413	9,035	9,069	13,760
Thailand	75,661	94,501	118,200	130,482	141,090	178,982	134,224	184,834	229,004	251,360	249,526
Viet Nam	25,256	31,969	36,761	44,891	62,765	80,714	69,949	84,839	106,750	113,780	132,125

Fonte: ns elaborazione su dati ADB

Il confronto tra i dati di commercio intra ed extra region mostrano che l'area del Mekong non si è ancora integrata e sviluppata dal punto di vista del commercio. Infatti, i valori intra region calcolati in percentuale sul commercio totale sono crescenti nel periodo 2000-2013 ma hanno valori compresi tra 4 e 7,4%.

Grafico 2: Commercio intra region in % del commercio totale 2000-2013 (dollar, million)



Fonte: ns elaborazione su dati ADB

Box 1: Import export per settori Cambodia 2004-2013

Exports to the World (% shares)					HS* Sector/Description	Imports from the World (% shares)				
2004	2005	2010	2012	2013		2004	2005	2010	2012	2013
1	0	0	0	0	1. Live Animals; animal products	1	0	0	0	0
0	0	1	2	3	2. Vegetable Products	1	1	1	1	1
0	0	0	0	0	3. Animal or vegetable fats and oils and their cleavage products	0	0	0	0	0
0	0	1	1	1	4. Prepared foodstuffs; beverages, spirits and vinegar; tobacco	6	6	1	6	5
0	0	0	0	0	5. Mineral products	12	9	0	15	12
0	0	0	0	0	6. Products of the chemical or allied industries	6	5	0	5	5
1	1	2	2	2	7. Plastics and articles thereof; rubber and articles	2	2	2	3	3
0	0	0	0	0	8. Raw hides and skins, leather, furskins and articles	1	1	0	1	1
0	0	1	0	1	9. Wood and articles of wood; wood charcoal; cork and articles of cork	0	0	1	0	0
22	19	32	29	25	10. Pulp of wood	2	2	32	2	12
72	74	55	55	55	11. Textiles and Garments	47	42	55	37	32
2	2	3	4	4	12. Footwear, headgear, umbrella, sun umbrellas, walking sticks	0	0	3	1	1
0	0	0	0	0	13. Articles of stone, plaster, cement, asbestos, mica or similar products	1	1	0	1	1
0	0	0	1	0	14. Natural or cultured pearls, precious or semi-precious stones	1	0	0	2	1
0	0	0	0	0	15. Base metals and articles of base metals	4	4	0	4	4
0	0	3	1	3	16. Machinery and mechanical appliances; electrical equipment	8	10	3	10	11
0	0	2	4	5	17. Vehicles, aircraft, vessels and associated transport equipment	6	6	2	9	9
0	0	0	0	0	18. Optical, photographic, cinematographic, measuring, checking, precision equipment	0	5	0	1	1
0	0	0	0	0	19. Arms and ammunition; parts and accessories thereof	0	0	0	0	0
0	0	0	0	0	20. Miscellaneous manufactured articles	2	2	0	1	2
1	1	0	0	0	21. Works of art, collectors' pieces and antiques	0	1	0	0	0
100	100	100	100	100	Total Shares (%)	100	100	100	100	100
2.8	3.0	5.6	7.8	9.2	Total (\$ billion)	2.1	2.6	5.6	7.1	9.2

Fonte: ns elaborazione dati UNCOMTRADE

Box 2: Import export per settori Repubblica Popolare Cinese (Guangxi, Yunnan) 2004-2013

Exports to the World (% shares)					HS* Sector/Description	Imports from the World (% shares)				
2004	2005	2010	2012	2013		2004	2005	2010	2012	2013
1	1	1	1	1	1. Live Animals; animal products	1	1	1	1	1
1	1	1	1	1	2. Vegetable Products	2	2	2	3	3
0	0	0	0	0	3. Animal or vegetable fats and oils and their cleavage products	1	1	1	1	1
2	1	1	1	1	4. Prepared foodstuffs; beverages, spirits and vinegar; tobacco	1	1	1	1	1
3	3	2	2	2	5. Mineral products	12	14	22	25	24
4	4	5	5	4	6. Products of the chemical or allied industries	8	8	7	6	6
3	3	3	4	4	7. Plastics and articles thereof; rubber and articles	6	6	6	5	5
2	2	1	2	2	8. Raw hides and skins, leather, furskins and articles	1	1	1	1	1
1	1	1	1	1	9. Wood and articles of wood; wood charcoal; cork and articles of cork	1	1	1	1	1
1	1	1	1	1	10. Pulp of wood	2	2	1	1	1
15	14	13	12	12	11. Textiles and Garments	4	4	2	2	2
3	3	3	3	3	12. Footwear, headgear, umbrella, sun umbrellas, walking sticks	0	0	0	0	0
2	2	2	2	2	13. Articles of stone, plaster, cement, asbestos, mica or similar products	1	1	0	1	0
1	1	1	2	2	14. Natural or cultured pearls, precious or semi-precious stones	0	1	1	1	1
7	7	7	7	7	15. Base metals and articles of base metals	9	9	7	6	5
42	42	44	42	43	16. Machinery and mechanical appliances; electrical equipment	42	41	35	31	31
4	4	6	5	5	17. Vehicles, aircraft, vessels and associated transport equipment	3	3	5	5	5
3	4	4	4	4	18. Optical, photographic, cinematographic, measuring, checking, precision equipment	7	8	7	6	6
0	0	0	0	0	19. Arms and ammunition; parts and accessories thereof	0	0	0	0	0
6	6	6	6	6	20. Miscellaneous manufactured articles	0	0	0	0	0
0	0	0	0	0	21. Works of art, collectors' pieces and antiques	0	0	0	0	0
100	100	100	100	100	Total Shares (%)	100	100	100	100	100
593.3	762.0	1,577.8	2,048.8	2,209.0	Total (\$ billion)	561.2	660.0	1,396.0	1,818.2	1,950.0

Fonte: ns elaborazione dati UNCOMTRADE

Box 3: Import export per settori Lao PDR 2004-2013

Exports to the World (% shares)					HS* Sector/Description	Imports from the World (% shares)				
2004	2005	2010	2012	2013		2004	2005	2010	2012	2013
1	1	0	0	0	1. Live Animals; animal products	1	1	2	4	4
7	6	6	7	6	2. Vegetable Products	2	2	2	1	1
0	0	0	0	0	3. Animal or vegetable fats and oils and their cleavage products	0	0	0	0	0
1	1	2	2	2	4. Prepared foodstuffs; beverages, spirits and vinegar; tobacco	10	11	7	7	5
4	12	35	32	32	5. Mineral products	16	20	21	20	19
1	0	1	3	2	6. Products of the chemical or allied industries	6	6	5	5	5
1	1	1	2	3	7. Plastics and articles thereof; rubber and articles	4	4	4	3	3
0	0	0	0	0	8. Raw hides and skins, leather, furskins and articles	0	0	0	0	0
37	28	16	19	25	9. Wood and articles of wood; wood charcoal; cork and articles of cork	0	0	0	0	0
0	0	0	0	0	10. Pulp of wood	1	1	1	1	1
41	30	12	9	7	11. Textiles and Garments	10	9	8	2	2
1	1	1	1	1	12. Footwear, headgear, umbrella, sun umbrellas, walking sticks	0	0	0	0	0
0	0	0	0	0	13. Articles of stone, plaster, cement, asbestos, mica or similar products	3	2	2	2	2
1	2	0	1	2	14. Natural or cultured pearls, precious or semi-precious stones	1	2	1	1	1
1	14	23	22	18	15. Base metals and articles of base metals	9	7	9	10	9
2	1	2	1	1	16. Machinery and mechanical appliances; electrical equipment	21	18	18	21	28
0	0	0	0	0	17. Vehicles, aircraft, vessels and associated transport equipment	9	12	16	19	17
0	0	0	0	0	18. Optical, photographic, cinematographic, measuring, checking, precision equipment	1	1	1	1	1
0	0	0	0	0	19. Arms and ammunition; parts and accessories thereof	0	0	0	0	0
1	1	0	0	0	20. Miscellaneous manufactured articles	1	1	1	2	1
0	0	0	0	0	21. Works of art, collectors' pieces and antiques	0	0	0	0	0
100	100	100	100	100	Total Shares (%)	100	100	100	100	100
442	609	2,072	3,210	3,924	Total (\$ million)	974	1,124	3,261	5,798	6,651

Fonte: ns elaborazione dati UNCOMTRADE

Box 4: Import export per settori Myanmar 2004-2013

Exports to the World (% shares)					HS Sector/Description	Imports from the World (% shares)				
2004	2005	2010	2012	2013		2004	2005	2010	2012	2013
8	7	5	4	4	1. Live Animals; animal products	2	2	2	1	1
11	11	20	14	11	2. Vegetable Products	1	2	1	1	1
0	0	0	0	0	3. Animal or vegetable fats and oils and their cleavage products	5	5	4	4	3
1	1	1	1	1	4. Prepared foodstuffs; beverages, spirits and vinegar; tobacco	5	6	7	7	6
34	42	44	45	42	5. Mineral products	13	12	14	9	10
0	0	0	0	0	6. Products of the chemical or allied industries	9	9	8	6	6
1	1	3	3	2	7. Plastics and articles thereof; rubber and articles	6	7	5	5	5
0	0	0	0	0	8. Raw hides and skins, leather, furskins and articles	0	0	0	0	0
19	21	14	15	15	9. Wood and articles of wood; wood charcoal; cork and articles of cork	0	0	0	0	0
0	0	0	0	0	10. Pulp of wood	2	2	1	1	1
20	10	9	11	11	11. Textiles and Garments	11	11	8	8	9
1	1	1	1	1	12. Footwear, headgear, umbrella, sun umbrellas, walking sticks	1	1	1	1	1
0	0	0	0	0	13. Articles of stone, plaster, cement, asbestos, mica or similar products	1	1	1	1	1
1	1	3	4	11	14. Natural or cultured pearls, precious or semi-precious stones	0	0	0	0	3
3	3	1	1	1	15. Base metals and articles of base metals	11	12	12	16	9
0	0	0	1	0	16. Machinery and mechanical appliances; electrical equipment	22	18	22	20	22
0	0	0	0	0	17. Vehicles, aircraft, vessels and associated transport equipment	7	8	9	17	14
0	0	0	1	0	18. Optical, photographic, cinematographic, measuring, checking, precision equipment	1	2	1	2	2
0	0	0	0	0	19. Arms and ammunition; parts and accessories thereof	0	0	0	0	0
1	1	0	0	0	20. Miscellaneous manufactured articles	1	1	2	2	3
0	0	0	0	0	21. Works of art, collectors' pieces and antiques	0	0	0	0	0
100	100	100	100	100	Total Shares (%)	100	100	100	100	100
3.3	3.8	6.6	8.4	10.8	Total (\$ billion)	3.1	3.2	9.1	15.4	18.8

Fonte: ns elaborazione dati UNCOMTRADE

Box 5: Import export per settori Thailandia 2004-2013

Exports to the World (% shares)					HS* Sector/Description	Imports from the World (% shares)				
2004	2005	2010	2012	2013		2004	2005	2010	2012	2013
2	2	2	2	1	1. Live Animals; animal products	2	2	1	2	2
4	3	4	4	4	2. Vegetable Products	1	1	1	2	1
0	0	0	0	0	3. Animal or vegetable fats and oils and their cleavage products	0	0	0	0	0
7	7	7	8	8	4. Prepared foodstuffs; beverages, spirits and vinegar; tobacco	2	1	2	2	2
4	5	5	7	7	5. Mineral products	14	18	18	20	21
3	4	5	5	6	6. Products of the chemical or allied industries	9	8	8	7	7
10	11	12	13	13	7. Plastics and articles thereof; rubber and articles	5	4	5	5	4
1	1	0	0	0	8. Raw hides and skins, leather, furskins and articles	1	0	0	0	0
1	1	1	1	1	9. Wood and articles of wood; wood charcoal; cork and articles of cork	1	1	0	0	0
1	1	2	1	1	10. Pulp of wood	1	1	1	1	1
7	6	4	3	3	11. Textiles and Garments	3	2	2	2	2
1	1	0	0	0	12. Footwear, headgear, umbrella, sun umbrellas, walking sticks	0	0	0	0	0
1	1	1	1	1	13. Articles of stone, plaster, cement, asbestos, mica or similar products	1	1	1	1	1
3	3	6	6	4	14. Natural or cultured pearls, precious or semi-precious stones	3	3	6	6	7
4	5	4	5	5	15. Base metals and articles of base metals	13	13	14	12	12
37	36	32	29	29	16. Machinery and mechanical appliances; electrical equipment	36	34	31	30	27
7	9	10	12	13	17. Vehicles, aircraft, vessels and associated transport equipment	5	5	5	7	8
2	2	2	2	2	18. Optical, photographic, cinematographic, measuring, checking, precision equipment	2	2	3	3	3
0	0	0	0	0	19. Arms and ammunition; parts and accessories thereof	0	0	0	0	0
2	2	1	1	1	20. Miscellaneous manufactured articles	1	0	1	1	1
0	0	0	0	0	21. Works of art, collectors' pieces and antiques	0	0	0	0	0
100	100	100	100	100	Total Shares (%)	100	100	100	100	100
96.2	110.1	195.3	229.5	228.5	Total (\$ billion)	94.4	118.2	182.4	247.6	250.7

Fonte: ns elaborazione dati UNCOMTRADE

Box 6: Import export per settori Vietnam 2004-2013

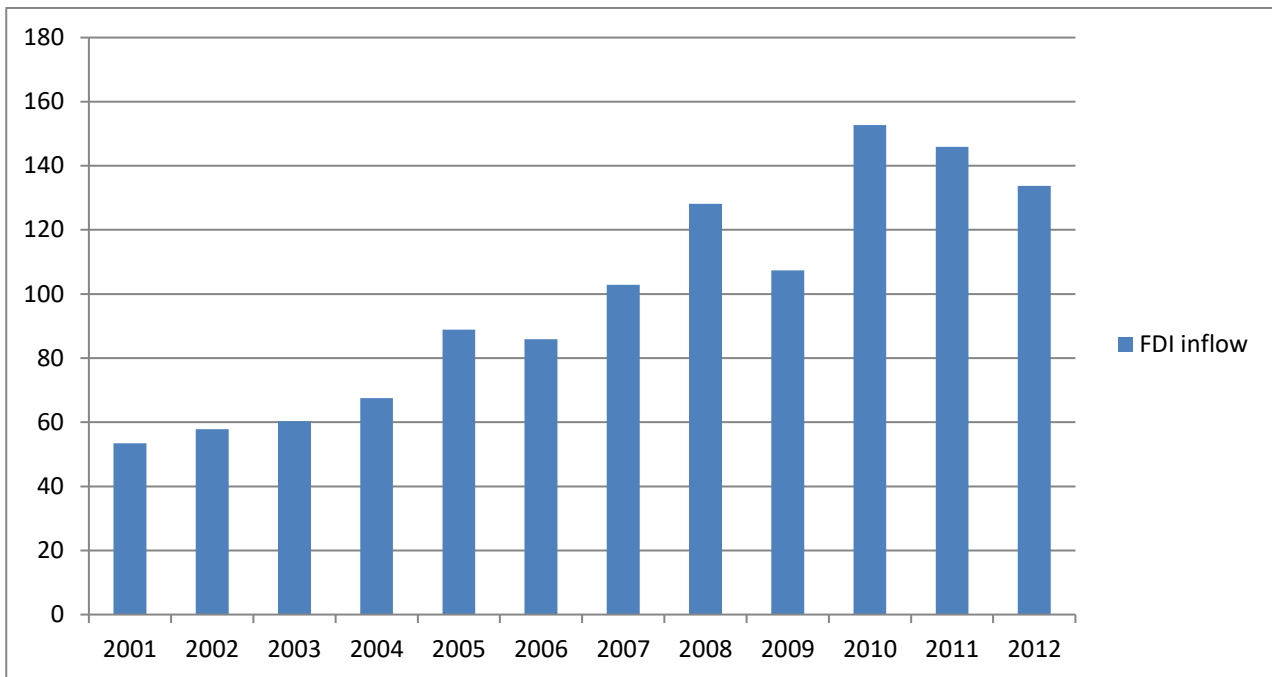
Exports to the World (% shares)					HS ⁹ Sector/Description	Imports from the World (% shares)				
2004	2005	2010	2012	2013		2004	2005	2010	2012	2013
9	8	6	4	4	1. Live Animals; animal products	1	1	1	1	1
10	10	11	10	8	2. Vegetable Products	1	2	3	3	3
0	0	0	0	0	3. Animal or vegetable fats and oils and their cleavage products	1	1	1	1	1
2	2	3	3	3	4. Prepared foodstuffs; beverages, spirits and vinegar; tobacco	3	3	4	4	4
24	26	12	11	8	5. Mineral products	13	15	10	11	8
1	1	2	2	2	6. Products of the chemical or allied industries	10	10	9	9	9
4	4	6	5	4	7. Plastics and articles thereof; rubber and articles	7	7	8	8	8
1	1	2	1	2	8. Raw hides and skins, leather, furskins and articles	2	2	1	1	1
1	1	1	1	2	9. Wood and articles of wood; wood charcoal; cork and articles of cork	2	2	1	1	1
0	0	1	0	0	10. Pulp of wood	2	2	2	2	2
18	16	18	16	16	11. Textiles and Garments	12	11	10	10	10
11	10	7	7	7	12. Footwear, headgear, umbrella, sun umbrellas, walking sticks	1	1	0	0	0
1	1	1	1	1	13. Articles of stone, plaster, cement, asbestos, mica or similar products	1	1	1	1	1
0	0	4	0	0	14. Natural or cultured pearls, precious or semi-precious stones	2	2	1	0	0
2	2	4	4	4	15. Base metals and articles of base metals	13	13	15	12	12
8	8	14	25	31	16. Machinery and mechanical appliances; electrical equipment	20	20	25	31	35
1	1	2	2	2	17. Vehicles, aircraft, vessels and associated transport equipment	6	4	4	3	2
0	0	1	2	2	18. Optical, photographic, cinematographic, measuring, checking, precision equipment	1	1	2	2	2
0	0	0	0	0	19. Arms and ammunition; parts and accessories thereof	0	0	0	0	0
4	5	5	4	4	20. Miscellaneous manufactured articles	1	1	1	1	1
0	0	0	0	0	21. Works of art, collectors' pieces and antiques	0	0	0	0	0
100	100	100	100	100	Total Shares (%)	100	100	100	100	100
26.5	32.4	72.2	114.5	132.0	Total (\$ billion)	32.0	36.8	84.8	113.8	132.0

Fonte: ns elaborazione dati UNCOMTRADE

I dati degli investimenti diretti esteri (FDI) confermano in parte le differenze intra ed extra region già analizzate per il commercio. Infatti, gli investimenti diretti esteri inflow, crescenti nel periodo 2001-2012 a una lieve riduzione nel 2009, sono in media cento volte più elevati degli investimenti diretti esteri intra

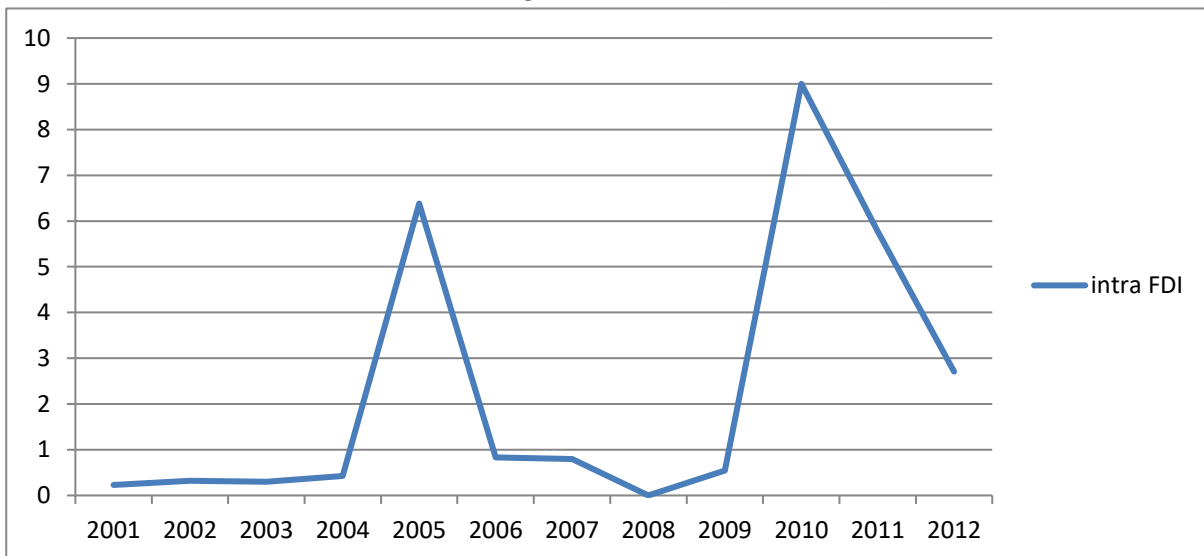
region. Inoltre, il grafico intra region evidenzia un'elevata variabilità con valori massimi negli anni 2005 e 2010.

Tabella 6: Investimenti diretti esteri inflow 2001-2012 (dollar, billion)



Fonte: ns elaborazione su dati ADB

Grafico 3: Investimenti diretti esteri intra region 2001-2012 (dollar, billion)



Fonte: ns elaborazione su dati ADB