

WTO 가

An Impacts on the Shipping Industry of China's WTO Accession

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Chul-Hwan Han

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Abstract : The accord between U.S. and China on China's entry to the World Trade Organization(WTO) will give our shipping industry both opportunities and challenges. The purpose of this paper is to analyze the impacts on the shipping industry of China's accession to the WTO. First of all, this paper reviews its effects on the economies of China, U.S. and Korea respectively. Then, it estimates export-import volume and port throughput of the major countries in 2005, which is considering China's WTO accession.

China's WTO entry will increase volume of Transpacific and Korea-China route, but it will also cause to decrease the growth rate of Korea's export volume to U.S. and induce the imbalance of exportimport container traffic in Korea-China route.

Nevertheless, it will be beneficial to non-liner shipping by way of increase of China's agriculture imports from the U.S. Also, it will accelerate liberalization of restrictive Chinese shipping market by the progress of U.S-China Maritime Agreement. Therefore, our shipping companies are required to set up new marketing strategies such as enhancement of branch office operations, cross-trades and multimodal transport services in China.

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 1986 GATT 13 WTO 가
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 2005 ,
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 1999 11 15 (WTO) 가 1987
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 WTO 가 . EU,
 23 WTO
 가
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 . < -1> .
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 10 , 12 5 WTO 가

WTO 가

1.

1978 . 20 9%
(GDP) 1998 9,511 1980 3
1980 1.8% 1998 3.4% 가
7 1/ 10, 1/4
GDP (1998 3,158) 3
1998 3,239
1980 8.5 가
3.1% 10

< -2>

| | 1980 | 1990 | 1995 | 1996 | 1997 | 1998 |
|--------|----------|----------|------------|------------|------------|------------|
| (%) | 6.4 | 7.8 | 10.2 | 9.7 | 8.8 | 7.8 |
| GDP() | 2,984 | 3,881 | 6,952 | 8,250 | 8,993 | 9,511 |
| (%) | 2.7 | 1.8 | 2.5 | 2.7 | 2.9 | 3.4 |
| () | 381 | 1,154 | 2,809 | 2,899 | 3,251 | 3,239 |
| (, %) | 181(0.9) | 621(1.8) | 1,488(2.9) | 1,511(2.9) | 1,828(3.5) | 1,838(3.6) |
| (, %) | 200(1.0) | 533(1.5) | 1,321(2.6) | 1,388(2.6) | 1,424(2.7) | 1,402(2.7) |

: 1) 「 , .
2) IMF, *International Financial Statistics*, .

WTO 가

, WTO 가
가
가 .

(IIE)가

2005 182 가 .1)
 (ITC) 14.3%,
 12.2% 가 ,2) 1998
 가 196 , 220 .
 (Goldman Sachs) 2005
 1998 가 6
 GDP 1998 33.8% 2005 36%

< -3>

WTO가

| | | |
|-------|--|-----|
| | 2005 | |
| (ITC) | <ul style="list-style-type: none"> • GDP 0.9%(4.1%) • 가 10.1%(12.2%) • 가 11.9%(14.3%) | 가 . |
| (IIE) | <ul style="list-style-type: none"> • 가 182 • 가 31 • 가 213 | |
| | <ul style="list-style-type: none"> • 3,360 가(9%) • 2,730 가(10%) • 630 | |
| | <ul style="list-style-type: none"> • 1.7 2.0% 가 6 가 170 200 | |

가

가

가

1) Daniel H. Rosen, "China and the WTO :An Economic Balance Sheet", *International Economics Policy Briefs*, IIE, 1999. 6.

2) U.S. International Trade Commission, *A ssessment of the Economic Effects on the United States of China's Accession to the WTO*, September 1999.

가
(NICs) 가
가
가
가
가 ,
가
1992
WTO 가
,
가
GDP 6.3% 1
가
가 3
가
WTO 가
,
,
,
0.9%
.4)

3) , “ WTO가 ”, Issue Paper, 1999. 11.

4) (ITC)
GDP 4.1% .

< -4>

| | 1995 | 1996 | 1997 | 1998 |
|---------|--------|--------|-------|--------|
| E U | 86.0 | 105.3 | 164.0 | 210.1 |
| | - 20.6 | - 0.2 | 46.2 | 74.3 |
| | - 5.4 | 16.9 | 28.3 | 14.8 |
| NICs | 121.9 | 68.8 | 177.8 | 103.1 |
| ASEAN-4 | - 5.1 | - 17.2 | - 9.1 | - 26.5 |
| | 167.0 | 122.2 | 404.2 | 435.7 |

: *China's Custom Statistics*.

: ASEAN-4 , , ,

2 .

WTO 가

가

가

가

가

가 23 ,

가 8

31

가

.5)

WTO 가

가

,

GDP,

, ,

27

가 가 ,

44 가 가

WTO 가

5)

가 2005

130

< -5>

: , %

| | 가 | 가 | 가 | 가 |
|-------|----|------|----|------|
| G D P | 3 | 0.05 | 17 | 0.05 |
| | 15 | 0.2 | 19 | 0.2 |
| | 24 | 9.0 | 27 | 10.1 |
| | 9 | 0.1 | 11 | 0.1 |
| | 34 | 5.2 | 44 | 6.9 |

: U.S. International Trade Commission, *Assessment of the Economic Effects on the United States of China's Accession to the WTO*, September 1999.

가

(17.0%), (6.3%), (3.2%) ,
(4 9,640), . . (3 1,920
, (2 9,240), (2 8,400),
(2 2,070) 가
. 가 , , 가
. 가
. 가
(6) 1995 가

가 가

가
WTO 가

6 7,400

가

6) U.S. International Trade Commission, *Assessment of the Economic Effects on the United States of China's Accession to the WTO*, September 1999.

WTO 가 가
가 , 가
가 WTO 가 가

< -6>
가 가
가 .
5 8,600
, , , , ASEAN 가 가
6 7,400 .

1 3,300 가
가 .
.

< -6>

:

| E U OECD 가 ASEAN | 24 | 27 |
|------------------------|-------|-------|
| | 89 | 83 |
| | 74 | 39 |
| | 63 | 115 |
| | - 21 | - 18 |
| | 129 | 133 |
| | 300 | 329 |
| | - 172 | 477 |
| | - 149 | - 586 |
| | 126 | 47 |
| | 194 | 113 |
| | 7 | - 83 |
| | 664 | 674 |

:< -5> .

3 .

WTO 가 ,
가 .
가 가 가
, WTO 가
가 가 .
3 - -
3
1998 184 8.2%
9% .
,
, , .
가 12 15
WTO 가 ,
가 가
,
(), .
32 55 가 , 21
38 가 10 17
.8)
WTO 가
가 .

7) , “ WTO가 ”, Issue Paper, 1999. 11.
8) , 「 WTO 가 . 」, 1999. 11.

16 17%

1998 20.7%

< -7>

| | | 1995 | 1996 | 1997 | 1998 |
|--|-----------|------|-------|------|------|
| | (A) | 242 | 217 | 216 | 228 |
| | | 304 | 333 | 301 | 204 |
| | | - 63 | - 116 | - 85 | 24 |
| | (B) | 1251 | 1297 | 1362 | 1323 |
| | (A/ B, %) | 19.3 | 16.7 | 15.9 | 17.2 |
| | (A) | 247 | 267 | 327 | 380 |
| | | 161 | 162 | 163 | 170 |
| | | 86 | 105 | 164 | 210 |
| | (B) | 1488 | 1510 | 1828 | 1838 |
| | (A/ B, %) | 16.6 | 17.7 | 17.9 | 20.7 |

: , “ WTO 가 ”, 1999. 11.

가 , , 가 ,

가 .9)

WTO 가

. < -8>

2002

9) , 「 , 1999. 9.

0.1 0.5% ,
가 .

< -8> .

| | 1994 | 1998 | 2002 | 1994 | 1998 | 2002 |
|--|------|------|------|------|------|------|
| | 0.4 | 0.7 | 0.8 | 1.7 | 1.5 | 1.4 |
| | 6.9 | 10.0 | 12.0 | 7.6 | 6.6 | 5.1 |
| | 2.2 | 4.9 | 5.1 | 3.0 | 3.0 | 2.8 |
| | 5.3 | 9.5 | 10.3 | 6.4 | 5.5 | 5.0 |
| | 15.3 | 11.4 | 17.0 | 5.7 | 5.9 | 4.8 |
| | 46.4 | 59.2 | 64.5 | 1.8 | 1.7 | 1.0 |

: , “ WTO 가 ”, SENSOR Spot Analysis, 1999. 11. 12.

WTO 가

1 .

1990 1 6,650 1997 3
6,100 11.5% 가 .
WTO 가
2005 8 8,700 .
1990 7,470 1997 1 3,300
9.4% , 가
6.4% 2005 2 1,800
2005
11
5.2% 가 2005 6 7,500

< -9>

| | 1994 | 1995 | 1996 | 1997 | 2005 |
|--|------|------|------|------|-------|
| | 382 | 437 | 444 | 494 | 1,105 |
| | 271 | 310 | 318 | 361 | 887 |
| | 111 | 127 | 126 | 133 | 218 |
| | 353 | 404 | 441 | 485 | 675 |

: 1) ISL, *Shipping Statistics Yearbook*,2) Hong Kong Port and Maritime Board Data. www.info.gov.hk/pmb.

: 1) 2005 1995 가

ITC가 WTO 가 (13%)

2) 1995 가

3) 「 」

1997 580 TEU 1990

25.8%

, 1997

1997 1,456 TEU 1990 14.4%

2,036 TEU 1997

12.4%

14.7%

2005 1,960 TEU

가

2005 6.4%

2,276

TEU

4,240 TEU

, 2005

16%

3,230 TEU

가

< - 10>

: TEU

| | 1994 | 1995 | 1996 | 1997 | 2005 |
|--|---------|---------|---------|---------|---------|
| | 15,114 | 17,232 | 18,698 | 20,365 | 42,400 |
| | 4,064 | 4,679 | 5,696 | 5,800 | 19,634 |
| | 11,050 | 12,550 | 13,460 | 14,567 | 22,766 |
| | 18,442 | 19,104 | 21,777 | 23,758 | 32,306 |
| | 3,826 | 4,503 | 5,078 | 5,637 | 12,107 |
| | 128,320 | 137,239 | 150,753 | 163,744 | 271,291 |

- : 1) *Containerisation International Yearbook*, .
2) Drewry, *World Container Terminals*, 1998.
3) Ocean Shipping Consultants, *World Container Port Markets to 2012*, 1999.
- : 1) 1995 2005
, ITC WTO 가
2) Hong Kong Port and Maritime Board 2006
6.5%
3) 「 」 .

2 .

1)

WTO 가 , 가
가
가
가
WTO 가
가
가 .

$\langle -11 \rangle$: TEU

| | | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2005 |
|-----|--|-------|-------|-------|-------|-------|-------|--------|
| () | | 1,022 | 1,196 | 1,527 | 1,862 | 2,023 | 2,311 | 4,655 |
| | | 664 | 620 | 648 | 832 | 1,048 | 1,089 | 1,920 |
| | | 560 | 547 | 581 | 655 | 667 | 714 | 854 |
| | | 739 | 677 | 721 | 775 | 778 | 788 | 894 |
| | | 274 | 255 | 283 | 375 | 425 | 469 | 691 |
| | | 3,260 | 3,296 | 3,761 | 4,500 | 4,941 | 5,371 | 9,014 |
| () | | 257 | 312 | 353 | 364 | 447 | 480 | 766 |
| | | 455 | 453 | 481 | 406 | 352 | 436 | 602 |
| | | 415 | 383 | 368 | 324 | 316 | 348 | 407 |
| | | 1,068 | 1,006 | 997 | 928 | 926 | 960 | 1,020 |
| | | 414 | 397 | 392 | 301 | 370 | 377 | 411 |
| | | 2,609 | 2,551 | 2,592 | 2,324 | 2,412 | 2,602 | 3,206 |
| | | 5,869 | 5,847 | 6,293 | 6,824 | 7,353 | 7,973 | 12,220 |

: 1) 2000 PIERS/JOC, *Trade Horizon*(Fall 1999) .
2) 2005 1995 가 .

2005 72.9%, 42.7%

2005 69 TEU 41 TEU

1995 12% 가

8% 2005

7.7% 12.8% 1998

2) .

1992

39.1%, 46.2% 가

40.4% 가 1998

IMF 가 .

0.5% 1998

(T/S) 36 TEU

49.8%

WTO 가 .

5

WTO 가

WTO 가 .

가 , .

가 가

16.4% 가 2005 124 TEU

, 10.3% 2005 가 73

TEU 2005 .

198 TEU ,
 109 TEU 55% .
 , ,
 , 가 ,
 , 가
 가 .
 55 : 45
 2005 가 .
 60 : 40

(repositioning) ,

< - 12> .

: TEU, %

| | 1992 | 1993 | 1994 | 1995 | 1996 | 1997 | 1998 | 2005 |
|-----|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|---------------------|
| () | 60,720 (21.2) | 115,293 (89.9) | 227,164 (97.0) | 317,986 (40.0) | 318,636 (0.2) | 419,698 (31.7) | 392,711 (-6.4) | 1,246,227 (16.4) |
| () | 68,186 (128.4) | 109,103 (60.0) | 173,496 (59.0) | 252,057 (45.3) | 293,874 (16.6) | 314,160 (6.9) | 337,519 (7.4) | 736,943 (10.3) |
| | 128,906 (61.2) | 224,396 (74.1) | 400,660 (78.6) | 570,043 (42.3) | 612,510 (7.4) | 733,858 (19.8) | 730,230 (-0.5) | 1,983,170 (13.7) |

: 1) 2005

1995

가

WTO 가

10% ()

2) ()

. 1998 2005

가

3 .

WTO 가

[illegible]

WT O
14.5 15.0%

532 450 730 720 2004 930 266 10)

4. 가

가 WTO .

(FMC) 가

O

(MOC) .

10) U.S. International Trade Commission, *Assessment of the Economic Effects on the United States of China's Accession to the WTO*, September 1999.

○

○ (SSEX)

○ 1 1

○ (freight forwarding) ,

, , 110

.11)

WTO 가

5 .

WTO 가

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4 12 20

‘Great China’

1998 , , 3 9

2 , 2,888 TEU

11) *American Shipper*, 1999. 8.

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1. , “ . ”, “ .
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2. , “ .
 , 1996.
3. , “ WTO 가
 , 1999. 11.
4. , “ WTO 가 ”, SENSOR Spot
 Analysis, 1999. 11.12.
5. , “ WTO가 ”, Issue Paper, 1999. 11.
6. , “
 , 1999. 9.
7. , “
 , 1999. 11.
8. , “ WTO 가 ”, VIP Report, 1999. 11.
 17.
9. *American Shipper*, 1999. 8.
10. Containerisation International, *China Syndrome*, 1999. 4.
11. *Containerisation International Yearbook*, .
12. Daniel H. Rosen, "China and the WTO : An Economic Balance Sheet",
 International Economics Policy Briefs, IIE, 1999. 6.
13. Drewry, *World Container Terminals*, 1998.
14. *Fairplay*, 1999. 8. 5.
15. Fearnleys, *Review*, .
16. Hong Kong Port and Maritime Board Data. www.info.gov.hk/pmb
17. IMF, *International Financial Statistics*, .
18. ISL, *Shipping Statistics Yearbook*, .
19. PIERS/JOC, *Trade Horizon*, Fall 1999.
20. U.S. International Trade Commission, *Assessment of the Economic
 Effects on the United States of China's Accession to the WTO*,
 1999. 9.