

UNCTAD/RMT/2003  
Including CORRIGENDUM

UNITED NATIONS CONFERENCE ON TRADE AND DEVELOPMENT  
Geneva

# REVIEW OF MARITIME TRANSPORT, 2003

*Report by the UNCTAD secretariat*



UNITED NATIONS  
New York and Geneva, 2003

## NOTE

The *Review of Maritime Transport* is a recurrent publication prepared by the UNCTAD secretariat since 1968 with the aim of fostering the transparency of maritime markets and analysing relevant developments. Any factual or editorial corrections that may prove necessary based on comments made by Governments would be reflected in a corrigendum to be issued subsequently.

\*

\* \*

Symbols of United Nations documents are composed of capital letters combined with figures. Use of such a symbol indicates a reference to a United Nations document.

\*

\* \*

The designations employed and the presentation of the material in this publication do not imply an expression of opinion by the Secretariat of the United Nations concerning the legal status of any country, territory, city or area, or of its authorities, or concerning the delimitation of its frontiers or boundaries.

\*

\* \*

Material in this publication may be freely quoted or reprinted, but acknowledgement is requested, with reference to the document number (see below). A copy of the publication containing the quotation or reprint should be sent to the UNCTAD secretariat at: Palais des Nations, CH – 1211 GENEVA 10, Switzerland.

---

UNCTAD/RMT/2003

---

UNITED NATIONS PUBLICATION

---

Sales No. E.03.II.D.10

---

ISBN 92-1-112582-0

---

ISSN 0566-7682

---

## CONTENTS

	<i>Page</i>
List of tables, figures, and boxes .....	v
Abbreviations and explanatory notes .....	viii
Introduction .....	ix
Summary of main developments .....	x
<i>Chapter</i>	<i>Page</i>
<b>1. Development of international seaborne trade .....</b>	<b>1</b>
A. World economic background .....	1
B. World seaborne trade .....	4
<b>2. Structure and ownership of the world fleet .....</b>	<b>19</b>
A. Structure of the world fleet .....	19
B. Ownership of the world fleet .....	26
C. Registry of vessels .....	32
D. Shipbuilding and the second-hand market .....	40
<b>3. Productivity of the world fleet and supply and demand in world shipping .....</b>	<b>45</b>
A. Operational productivity .....	45
B. Supply and demand in world shipping .....	47
C. Comparison of cargo turnover and fleet ownership .....	49
<b>4. Trade and freight markets .....</b>	<b>53</b>
A. Crude oil and petroleum products seaborne freight market .....	53
B. Dry bulk shipping market .....	58
C. Liner shipping market .....	60
D. Estimates of total freight costs in world trade .....	71

<i>Chapter</i>	<i>Page</i>
<b>5. Port development .....</b>	<b>75</b>
A. Container port traffic .....	75
B. Improving port performance .....	75
C. Institutional change .....	80
D. Security measures in ports .....	81
<b>6. Trade and transport efficiency .....</b>	<b>85</b>
A. Efficient transport and trade facilitation .....	85
B. Maritime transport in WTO .....	86
C. Multimodal transport: the feasibility of an international legal instrument .....	88
D. Production and leasing of containers .....	92
E. Railway development .....	95
F. Status of conventions .....	96
<b>7. Review of regional developments: Sub-Saharan Africa .....</b>	<b>99</b>
A. Economic background .....	99
B. Trade structure .....	102
C. Maritime transport .....	104
D. Inland transport .....	114
E. Transport costs and their impact on the import bill .....	116
<b>Annexes</b>	
I. Classification of countries and territories .....	121
II. World seaborne trade by country groups, 1970, 1980, 1990 and 1999–2002 .....	125
III(a). Merchant fleets of the world by flag of registration, groups of countries and types of ship, as of 31 December 2002 (in grt) .....	129
III(b). Merchant fleets of the world by flag of registration, groups of countries and types of ship, as of 31 December 2002 (in thousand dwt) .....	135

## LIST OF TABLES, FIGURES AND BOXES

<i>Table</i>	<i>Page</i>
1. World output growth, 2000–2002 .....	2
2. Growth in the volume of merchandise trade by geographical region, 2000–2002 .....	3
3. Development of international seaborne trade, selected years .....	5
4. World seaborne trade in 1970, 1980, 1990 and 1998–2002, by types of cargo and country groups ...	8
5. World seaborne trade in ton-miles, selected years .....	17
6. World fleet size by principal types of vessel, 2001–2003 .....	21
7. Distribution of the world fleet and TEU capacity of fully cellular container ships, by country groups, in 2001, 2002 and 2003 .....	22
8. Age distribution of the world merchant fleet, by types of vessel, as of 1 January 2003 .....	23
9. Deliveries of newbuildings, selected years .....	24
10. Broken-up tonnage, 1990 and 1998–2002 .....	24
11. Tonnage reported sold for breaking, by types of vessel, 1998–2002 .....	25
12. Average age of broken-up ships, by type, from 1998 to 2002 .....	25
13. Distribution of world tonnage (dwt) by groups of countries of registration, 1980, 1990, 2001, 2002 and 2003 .....	28
14. Percentage shares of world tonnage, by types of vessel and country groups, in 1970, 1980, 1990, 2000, 2001 and 2002 .....	29
15. Structure of the merchant fleets of the main country groups as of 1 January 2003 .....	31
16. The 35 most important maritime countries and territories as of 1 January 2003 .....	33
17. Tonnage distribution of major open-registry fleets as of 1 January 2003 .....	35
18. Tonnage owned by nationals of, and registered in, the country or territory of registry in the total fleet of the most important open and international registers, as 1 January .....	37
19. True nationality of major open-registry fleets as of 1 January 2003 .....	38
20. Newbuilding contracts placed for the main types of ship during 1992–2002 .....	42
21. World tonnage on order as of 1 January 2003 .....	43
22. Representative newbuilding prices in selected years .....	44
23. Second-hand prices for five-year-old vessels, 1997–2002 .....	44
24. Cargo carried and ton-miles performed per deadweight ton (dwt) of the total world fleet, selected years .....	46
25. Estimated productivity of tankers, bulk carriers, combined carriers and the residual fleet, selected years (tons carried per dwt) .....	46

<i>Table</i>	<i>Page</i>
26. Estimated productivity of tankers, bulk carriers, combined carriers and the residual fleet, selected years (thousands of ton-miles performed per dwt) .....	47
27. Tonnage oversupply in the world merchant fleet, 1990 and 1998–2002 .....	48
28. Analysis of tonnage surplus by main type of vessel, 1996–2002 .....	48
29. Comparison between total cargo turnover and fleet ownership, by country groups, in 1970, 1980, 1990 and 2000–2002 .....	50
30. Maritime engagement of 25 major trading nations .....	51
31. Tanker freight indices, 2000–2003 .....	54
32. Dry cargo freight indices, 2000–2003 .....	60
33. Growth of the world cellular container fleet .....	62
34. Leading 20 container service operators (as of 30 September 2002) on the basis of number of ships and total shipboard capacity .....	63
35. Containership time charter rates .....	65
36. Freight rates (market averages) on the three major liner trade routes, 2001–2003 .....	67
37. Estimated cargo flows along major trade routes .....	70
38. Capacity share for the trans-Pacific trade .....	70
39. Liner freight indices, 2000–2003 .....	71
40. Ratio of liner freight rates to prices of selected commodities .....	72
41. Estimates of total freight costs for imports in world trade, by country groups .....	73
42. Container port traffic of 51 developing countries and territories in 2001, 2000 and 1999 .....	76
43. Top 20 container terminals and their throughput, 2002 and 2001 .....	78
44. Structure of schedule of specific commitments .....	88
45. Percentage shares for container production .....	92
46. Container prices in China .....	94
47. Real GDP of developing countries of sub-Saharan Africa .....	100
48. Merchandise trade of Africa .....	103
49. Composition of African trade by blocks .....	103
50. African exports in terms of value .....	104
51. Organizations promoting intra-African trade .....	105
52. Distribution of intra-African trade in goods in value, 2000 .....	107

<i>Table</i>	<i>Page</i>
53. Sub-Saharan African fleet .....	108
54. Age of sub-Saharan African fleet .....	110
55. Container throughput in sub-Saharan African ports in thousands of TEU in 2000 .....	113
56. Container traffic between the West Coast of Africa and Europe .....	114
57. Estimated unit road transport cost for container (maximum 28 tons in 40') .....	116
58. Estimates of total freight costs on imports of African countries (excluding South Africa) for 2001 ....	118
59. Estimates of total freight costs of imports for selected African landlocked countries for 2001 .....	118

*Figure*

1. Annual change in OECD industrial production and world seaborne trade, 1999–2002 .....	4
2. International seaborne trade for selected years .....	5
3. World seaborne trade by country groups .....	15
4. World fleet by principal types of vessel, selected years .....	20
5. World tonnage by country groups, as of 1 January 2003 .....	27
6. Index of ton-miles performed per deadweight ton of total world fleet, 1992–2002 .....	45
7. Trends in surplus capacity by main vessel types, selected years .....	49
8. Estimates of total freight costs for imports in world trade, by country groups and for selected years.	74
9. Total annual box production .....	93
10. Annual production of boxes other than for standard dry freight .....	93
11. Term lease rates .....	94
12. Fleets of leased tanks, reefers and HC reefers, and open tops and open sides .....	95

*Box*

1. Vessel and registry groupings used in the <i>Review of Maritime Transport</i> .....	xiii
2. The impact of the <i>Prestige</i> .....	41
3. Security and insurance expenses for shipowners .....	61
4. Contracting States of selected conventions on maritime transport as of 31 August 2003 .....	97
5. ACIS .....	117

## ABBREVIATIONS AND EXPLANATORY NOTES

### *Abbreviations*

<b>ACIS</b>	Advance Cargo Information System
<b>APEC</b>	Asia-Pacific Economic Cooperation
<b>BAF</b>	bunkering adjustment factor
<b>c.i.f.</b>	cost, insurance and freight
<b>DMECs</b>	developed market-economy countries
<b>dwt</b>	deadweight tons
<b>ECLAC</b>	Economic Commission for Latin America and the Caribbean
<b>EEC</b>	European Economic Community
<b>EU</b>	European Union
<b>FDI</b>	foreign direct investment
<b>FIO</b>	free in and out
<b>f.o.b.</b>	free on board
<b>GDP</b>	gross domestic product
<b>grt</b>	gross registered tons
<b>IICL</b>	Institute of International Container Lessors
<b>IMF</b>	International Monetary Fund
<b>IMO</b>	International Maritime Organization
<b>IT</b>	information technology
<b>LDC</b>	least developed country
<b>LNG</b>	liquefied natural gas
<b>LPG</b>	liquefied petroleum gas
<b>mbpd</b>	million barrels per day
<b>NAFTA</b>	North American Free Trade Agreement
<b>OECD</b>	Organisation for Economic Co-operation and Development
<b>OPEC</b>	Organization of the Petroleum Exporting Countries
<b>TEU</b>	20-foot equivalent unit
<b>ULCC</b>	ultra-large crude carrier
<b>UNCTAD</b>	United Nations Conference on Trade and Development
<b>VLCC</b>	very large crude carrier
<b>WS</b>	Worldscale
<b>WTO</b>	World Trade Organization

预览已结束，完整报告链接和二维码如下：

[https://www.yunbaogao.cn/report/index/report?reportId=5\\_10594](https://www.yunbaogao.cn/report/index/report?reportId=5_10594)

