

UNITED NATIONS CONFERENCE ON TRADE AND DEVELOPMENT
Geneva

Review of Maritime Transport 1992

Report by the UNCTAD secretariat



UNITED NATIONS
New York, 1993

NOTE

This *Review* has been prepared by the UNCTAD secretariat in accordance with section B of the programme of work of the Committee on Developing Services Sectors: Fostering Competitive Services Sectors in Developing Countries: Shipping. Any factual or editorial corrections that may prove necessary based on comments made by the Committee in its consideration of this document or received directly from 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. A copy of the publication containing the quotation or reprint should be sent to the UNCTAD secretariat.

TD/B/CN.4/27

UNITED NATIONS PUBLICATION
<i>Sales No. E.94.II.D.2</i>
ISBN 92-1-112336-4 ISSN 0566-7682

CONTENTS

		<u>Page</u>
Abbreviations		viii
Explanatory notes		viii
Introduction		ix
Summary of main developments in 1992		ix
<u>Chapter</u>	<u>Paragraphs</u>	<u>Page</u>
I. <u>The development of international seaborne trade</u>	1 - 13	1
A. World economic background	1 - 3	1
B. International seaborne trade	4 - 13	1
II. <u>Development of the world fleet</u>	14 - 34	11
A. Structure of the world fleet	14 - 20	11
B. Ownership of the world fleet	21 - 26	11
C. The 35 most important maritime countries and territories	27 - 28	20
D. Open and international registers	29 - 32	20
E. Comparison of cargo turnover and fleet ownership	33	20
F. Forecasts for world fleet development	34	20
III. <u>Productivity of the world fleet and the supply and demand situation in world shipping</u>	35 - 40	27
A. Estimate of tons and ton-miles per dwt	35	27
B. Supply and demand in world shipping	36 - 40	27
IV. <u>Shipbuilding, second-hand market and demolition</u>	41 - 55	35
A. Newbuilding orders	41 - 42	35
B. Ship prices	43	35
C. Deliveries of newbuildings	44 - 46	35
D. Tonnage on order	47 - 50	35
E. Sale and purchase of second-hand tonnage	51 - 52	36
F. Demolition of ships	53 - 55	44

CONTENTS (continued)

<u>Chapter</u>	<u>Paragraphs</u>	<u>Page</u>
V. <u>Port development</u>	56 - 75	47
A. Container port traffic	56 - 58	47
B. Port development - from a transport centre to a logistic platform	59 - 75	47
VI. <u>Freight markets</u>	76 - 92	51
A. Freight rates of main cargo sectors	76 - 87	51
B. Liner freight rates as a percentage of prices for selected commodities	88 - 89	54
C. Estimates of global freight costs	90 - 91	55
D. Marine bunker prices	92	58
VII. <u>Multimodal transport and technological developments</u>	93 - 112	59
A. Group of Experts on Multimodal Transport	93	59
B. Second Seminar on Container Dimensions	94 - 95	59
C. Further development of the double-stack container train network in North America	96 - 100	59
D. Rail landbridges	101 - 102	60
E. Introduction of 9' 06" as a standard container height	103 - 105	60
F. World container population	106 - 108	60
G. Container production	109 - 112	61
VIII. <u>Other developments</u>	113 - 150	65
A. United Nations Convention on a Code of Conduct for Liner Conferences	113	65
B. United Nations Convention on International Multimodal Transport of Goods	114	65
C. United Nations Convention on the Carriage of Goods by Sea, 1978 (Hamburg Rules)	115 - 117	65
D. United Nations Convention on Conditions for Registration of Ships	118 - 119	66
E. Maritime liens and mortgages	120 - 122	66
F. General average	123	66
G. UNCTAD Minimum Standards for Shipping Agents	124 - 125	66
H. The new UNCTAD/ICC Rules for Multimodal Transport Documents	126 - 135	67

CONTENTS (continued)

<u>Chapter</u>	<u>Paragraphs</u>	<u>Page</u>
I. Technical cooperation and training	136 - 149	69
J. New classification of ships by type reviewed	150	70

Annex

I. Classification of countries and territories	73
II. World seaborne trade according to geographical areas, 1970, 1990 and 1991	77
III.(a) Merchant fleets of the world by flag of registration, groups of countries and types of ships (in grt), as at 31 December 1992	79
III.(b) Merchant fleets of the world by flag of registration, groups of countries and types of ships (in dwt), as at 31 December 1992	83
IV. Major flows of selected bulk commodities	89
V. International classification of ships by type	115

LIST OF TABLES

<u>Table</u>	<u>Page</u>
1. Development of international seaborne trade, 1970 and 1980-1992	3
2. World seaborne trade by types of cargo, 1970 and 1980-1992	5
3. World seaborne trade in 1970, 1990, 1991 and 1992 (est.) by type of cargo and country groups	6
4. World fleet by principal types of vessel, 1990-1992	12
5. Distribution of the world fleet and TEU capacity of fully cellular containerhips by groups of countries, at mid-year 1990, end-1991 and end-1992	14
6. Age distribution of the world merchant fleet by type of vessel (as at 31 December 1992)	15
7. Distribution of world tonnage (grt and dwt) by groups of countries of registration, 1970, 1991 and 1992	16
8. Percentage shares of world tonnage by type of vessel and country groups, 1980, 1991 and 1992	18
9. Structure of the merchant marine fleet of the main country groups (as at 31 December 1992)	19
10. The 35 most important maritime countries (as at 31 December 1992)	21
11. Tonnage distribution of major open-registry fleets (as at 31 December 1992)	22
12. Tonnage owned by the nationals of the country of registry in the total fleet of the most important open and international registers (as at 31 December 1992)	23
13. True nationality of major open-registry fleets (as at 31 December 1992)	24
14. Comparison between total cargo turnover and fleet ownership by groups of countries, 1970, 1991 and 1992	25

CONTENTS (continued)

<u>Table</u>		<u>Page</u>
15.	Cargo carried and ton-miles performed per dwt of the total world fleet, 1980-1992	28
16.	Estimated productivity of tankers, bulk carriers, combined carriers and the residual fleet, 1980-1992 (ton-miles performed per dwt)	29
17.	Estimated productivity of tankers, bulk carriers, combined carriers and the residual fleet, 1980-1992 (tons carried per dwt)	30
18.	Tonnage oversupply in the world merchant fleet, 1983-1992	31
19.	Analysis of tonnage oversupply by vessel type, 1983-1992	32
20.	Tanker tonnage engaged in oil storage, 1981-1992	34
21.	Newbuilding contracts placed for the main types of ship during 1988-1992	37
22.	Representative newbuilding prices, 1980, 1985 and 1988-1992	38
23.	Distribution of deliveries of newbuildings by principal types of ships, 1991-1992	39
24.	Distribution of deliveries of newbuildings by groups of countries of build, 1991-1992	40
25.	World tonnage on order at the end of each quarter, 1990, 1991 and 1992	41
26.	World tonnage on order as at the end of 1992	42
27.	Second-hand prices for five-year-old vessels, 1986-1992	42
28.	Development of sales and purchases of second-hand bulkers in 1992	43
29.	Broken-up tonnage trends, 1980, 1985-1992	44
30.	Tonnage reported sold for breaking by type of vessel, 1987-1992	44
31.	Average age of broken-up ships by type during 1985-1992	45
32.	Demolition prices in 1990-1992	45
33.	Container port traffic of developing countries and territories, 1991 and 1990	48
34.	Freight rate indices, 1990-1992	52
35.	Comparative freight rates for selected commodities, 1992 versus 1991	54
36.	The ratio of liner freight rates to prices of selected commodities	55
37.	Estimates of total freight costs in world trade by groups	56
38.	Fluctuations in marine bunker fuel prices, 1990-1992	58
39.	Analysis of world container fleet by length and height	62

CONTENTS (continued)

<u>Table</u>		<u>Page</u>
40.	Analysis of change in world container population by length/height	62
41.	Breakdown of annual container production by region/country for 1989-1991	63
42.	Comparison of standard freight container prices for 1991 and 1992	64

LIST OF BOXES

Box

1.	Vessel and registry groupings used in the Review of Maritime Transport	x
2.	Tanker demand likely to increase with growing world dependence on OPEC oil	9
3.	Liner trade growth changes direction	26
4.	New tankers expected to keep rates low	46
5.	Restructuring of ports in Latin America and the Caribbean	50
6.	Increasing emphasis on quality control in transport services!	64
7.	Adoption of the International Convention on Maritime Liens and Mortgages, 1993	68

LIST OF GRAPHS

Graph

1.	Annual change in OECD industrial production and seaborne trade, 1984-1992	2
2.	International seaborne trade for selected years	4
3.	Export structure and direction of trade for developing countries	4
4.	World seaborne trade by country groups	8
5.	Forecast of world seaborne trade, 1993 to 2003	8
6.	World fleet by principal types	13
7.	World tonnage by country groups, 1992	17
8.	Forecast of world fleet by principal type	26
9.	Index of ton-miles performed per dwt total world fleet	28
10.	Trends in surplus capacity by main vessel types, 1983-1992	33
11.	Major conference rates 1988-1992	53
12.	Baltic freight index and selected routes, 1992	53
13.	Estimates of total freight costs in world trade by groups	57

ABBREVIATIONS

cif	Cost, insurance and freight
CIS	Commonwealth of Independent States
dwt	Deadweight tons
EEC	European Economic Community
FEU	Forty-foot equivalent unit
fob	Free on board
GDP	Gross domestic production
grt	Gross registered tons
ldt	Light displacement tons
MTO	Multimodal transport operator
NIC	Newly industrialized countries
NVO-MTO	Non-vessel-operating multimodal transport operator
OECD	Organisation for Economic Cooperation and Development
TEU	Twenty-foot equivalent unit
ULCC	Ultra-large crude carrier
VLCC	Very large crude carrier
VO-MTO	Vessel-operating multimodal transport operator

EXPLANATORY NOTES

References to dollars (\$) are to United States dollars.

Billion means a thousand million.

Tons refer to metric tons, unless otherwise stated.

Details and percentages presented in tables, due to rounding, do not necessarily add up to the totals.

Two dots (..) indicate that data are not available or are not separately reported.

A dash (-) signifies that the amount is nil, or less than half the unit used.

In some tables, the data shown for earlier years have been revised and updated, and may therefore differ from those shown in previous issues of this *Review*.

In the tables and the text, the use of the term "countries" refers to countries, territories or areas.

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_11208

