

UNITED NATIONS CONFERENCE ON TRADE AND DEVELOPMENT
Geneva

**Review
of Maritime Transport
1990**

Report by the UNCTAD secretariat



UNITED NATIONS
New York, 1991

NOTE

This *Review* has been prepared by the UNCTAD secretariat in accordance with item VI of the programme of work of the Committee on Shipping. Any factual and editorial corrections that may prove necessary in the light of 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. Mention 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 the expression of any opinion whatsoever on the part of 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 acknowledgment is requested, together with a reference to the document number. A copy of the publication containing the quotation or reprint should be sent to the UNCTAD secretariat.

TD/B/C.4/340

UNITED NATIONS PUBLICATION

Sales No. E.91.II.D.16

ISBN 92-1-112310-0
ISSN 0566-7682

CONTENTS

	<u>Page</u>
Abbreviations	viii
Explanatory notes	ix
Introduction	x
Summary of main developments in 1990	x
<u>Chapter</u>	<u>Paragraphs</u> <u>Page</u>
I. <u>The development of international seaborne trade</u>	1 - 8 1
II. <u>Development of the world fleet</u>	9 - 28 8
A. Size and ownership of the world fleet	9 - 12 8
B. The 35 most important maritime countries and territories	13 - 14 8
C. Major open-registry countries' fleets and international registries	15 - 19 13
D. Types of vessel	20 - 26 15
E. Age distribution of the world fleet	27 20
F. Comparison of cargo turnover and fleet ownership	28 20
III. <u>Productivity of the world fleet and the supply and demand situation in shipping</u>	29 - 36 24
A. Productivity of the world fleet	29 24
B. Supply and demand situation in world shipping	30 - 34 24
C. Imbalance between supply and demand for seafarers	35 - 36 29
IV. <u>Shipbuilding</u>	37 - 55 30
A. Ship prices	37 - 39 30
B. Sales and purchases of second-hand bulker tonnage	40 30
C. Newbuilding orders contracted in 1990	41 - 42 30
D. Tonnage on order	43 - 47 34
E. Deliveries of newbuildings	48 - 49 34
F. Demolition of ships	50 - 55 38

CONTENTS (continued)

<u>Chapter</u>	<u>Paragraphs</u>	<u>Page</u>
V. <u>Port development</u>	56 - 60	42
A. Port throughput	56 - 57	42
B. Impact of containerization	58 - 60	42
VI. <u>Freight markets</u>	61 - 66	45
A. Freight rates of main cargo sectors	61 - 64	45
B. Liner freight rates as a percentage of prices of selected commodities	65	45
C. Estimates of global freight costs	66	47
VII. <u>Multimodal transport and technological developments</u>	67 - 111	52
A. Technological developments	67 - 97	52
B. Technological developments in electronic data processing	98 - 110	59
C. UNCTAD/ICC Rules on Multimodal Transport Documents	111	61
VIII. <u>Other developments</u>	112 - 152	62
A. United Nations Convention on a Code of Conduct for Liner Conferences	112 - 117	62
B. United Nations Convention on International Multimodal Transport of Goods	118	64
C. United Nations Convention on the Carriage of Goods by Sea (Hamburg Rules)	119 - 120	64
D. United Nations Convention on Conditions for Registration of Ships	121 - 122	64
E. UNCTAD Committee on Shipping	123 - 129	64
F. UNCTAD Model Clauses on Marine Hull and Cargo Insurance	130	65
G. Maritime liens, mortgages and arrest	131 - 133	65
H. Maritime fraud	134	66
I. UNCTAD Minimum Standards for Shipping Agents	135	66
J. Working Group on International Shipping Legislation	136	66
K. Work of the <u>Ad Hoc</u> Intergovernmental Group of Port Experts and related issues	137 - 138	66
L. Technical co-operation and training	139 - 149	67

CONTENTS (continued)

<u>Chapter</u>	<u>Paragraphs</u>	<u>Page</u>
IX. <u>Activities of international regional organizations in the field of maritime transport</u>	150 - 198	70
A. Economic Commission for Latin America and the Caribbean (ECLAC)	153 - 157	70
B. ASEAN Committee on Transportation and Communications (COTAC)	158 - 161	70
C. Ministerial Conference of West and Central African States on Maritime Transport (MINCONMAR)	162 - 165	71
D. Preferential Trade Area for Eastern and Southern African States	166 - 173	72
E. Association of Latin American Shipowners (ALAMAR)	174 - 178	72
F. Caribbean Shipping Association	179 - 182	73
G. Islamic Shipowners' Association	183 - 186	74
H. South Pacific Forum	187 - 191	74
I. Recent developments towards the establishment of the EEC common shipping policy	192 - 197	75
J. Port state control at the regional level	198	75
X. <u>Maritime environment issues</u>	199 - 214	77
A. Protection of the marine environment	199 - 208	77
B. Developments relating to IMO safety conventions during 1990	209 - 210	80
C. Tonnage lost	211 - 213	80
 <u>Annex</u>		
I. Classification of countries and territories		86
II. World seaborne trade according to geographical areas, 1970, 1989 and 1990		89
III.(a) Merchant fleets of the world by flag of registration, groups of countries and types of ships (in thousand grt)		91
III.(b) Merchant fleets of the world by flag of registration, groups of countries and types of ships (in thousand dwt)		95

CONTENTS (continued)

LIST OF TABLES

<u>Table</u>	<u>Page</u>
1. Development of international seaborne trade, 1970 and 1980-1990	2
2. World seaborne trade by types of cargo, 1970 and 1980-1990	3
3. World seaborne trade in 1970, 1988, 1989 and 1990 (est.) by type of cargo and country groups	4
4. Distribution of world tonnage (grt and dwt) by groups of countries of registration, 1970, 1989 and 1990	9
5. The 35 most important maritime countries (as at 1 July 1990)	12
6. Tonnage distribution of major open-registry fleets	14
7. True nationality of major open-registry fleets (as at 1 July 1990)	16
8. World fleet by principal types of vessels, 1988-1990	17
9. Percentage shares of world tonnage by type of vessel and country groups (as at 1 July), 1980, 1985, 1989 and 1990	19
10. Distribution of the world fleet and TEU capacity of fully cellular containerhips by groups of countries at mid-year 1988, 1989 and 1990	21
11. Age distribution of the world merchant fleet by type of vessel as at 1 July 1990	22
12. Comparison between total cargo turnover and fleet ownership by groups of countries, 1970 and 1988-1990	23
13. Cargo tonnage carried and ton-miles performed per dwt of the total world fleet, 1980-1990	24
14. Estimated productivity of tankers, bulk carriers, combined carriers and the residual fleet, 1980-1990 (ton-miles performed per dwt)	25
15. Estimated productivity of tankers, bulk carriers, combined carriers and the residual fleet, 1980-1990 (tons carried per dwt)	25
16. Tonnage oversupply in the world merchant fleet, 1981-1990	26
17. Analysis of tonnage oversupply by vessel type, 1981-1990	27
18. Tanker tonnage engaged in oil storage, 1981-1990	28
19. Representative newbuilding prices, 1980, 1985 and 1987-1990	31
20. Second-hand prices for five-year old vessels, 1985-1990	31
21. Development of sales and purchases of second-hand bulkers in 1990	32
22. Newbuilding contracts placed for the main types of ship during 1987-1990	32

CONTENTS (continued)

<u>Table</u>	<u>Page</u>
23. Reported cancellations of shipbuilding orders from 1988 to early 1991	33
24. World tonnage on order at the end of each quarter, 1988, 1989 and 1990	35
25. World tonnage on order as at the end of 1990	36
26. Distribution of deliveries of newbuildings by principal types of ships, 1988-1990	37
27. Distribution of deliveries of newbuildings by groups of countries of build, 1988-1990	38
28. Broken-up tonnage trends, 1980-1990	39
29. Tonnage reported sold for breaking by type of vessel, 1985-1990	39
30. Demolition prices in 1988-1990	40
31. Container port traffic of developing countries and territories, 1989 and 1988	44
32. Freight rate indices, 1988-1990	46
33. Fluctuations in marine bunker fuel prices, 1988-1990	47
34. Comparative freight rates for selected commodities, 1990 versus 1989	48
35. The ratio of liner freight rates to prices of selected commodities	48
36. Estimates of total freight costs in world trade by groups	49
37. Multimodal containerized movements utilizing the Danube waterway	53
38. Container lessors	55
39. World container leasing fleet	55
40. World container fleet by ownership and type	56
41. Ownership of geographical regions	56
42. World container fleet by type and length	57
43. World container fleet by cladding	57
44. Ownership of containers by region	57
45. Construction of containers	58
46. International multimodal containers at ICDs	59
47. Status of international conventions relating to marine pollution	79
48. Status of maritime safety conventions and protocols	81
49. Tonnage lost, 1986-1990	82
50. Tonnage reported lost by vessel type, 1986-1990	82

CONTENTS (continued)

LIST OF BOXES

<u>Box</u>	<u>Page</u>
1. New vessel groupings used in the Review of Maritime Transport	xi
2. GATT economists estimate continued high trade growth for 1990 despite mid-East crisis	7
3. Ship costs to soar in 1990s	29
4. Prospects for demolition	41
5. Shipping costs hurt poor lands	51
6. United Nations Convention on a Code of Conduct for Liner Conferences - Result of the Review Conference	63
7. Inter-American trades go free	76
8. Double hull no panacea	78

LIST OF GRAPHS

Graph

1. International seaborne trade for selected years, 1970 to 1990	3
2. World seaborne trade by country groups, 1990, percentage distribution of tonnage	6
3. Forecast of world seaborne trade, 1991 to 2000	6
4. World fleet capacity by country groups, selected years, 1970 to 1990	10
5. World tonnage by country groups, mid-year 1990, dwt	10
6. Forecast of world fleet by principal type of vessel, 1991 to 2001	11
7. The 10 most important maritime countries and their shares under national and foreign flags: dwt under control	13
8. World fleet by principal types of vessel, 1988-1990 mid-year	18
9. Newbuilding contracts placed for the main types of ships during 1990	33
10. Tonnage sold for breaking by type of vessel, 1982 to 1990	40
11. Container port throughput by developing country groups	43
12. Freight as percentage of c.i.f. import values by country groups	50
13. Multimodal maritime containers moving by rail in selected developing countries	53
14. Tonnage reported lost by vessel type, 1986-1990	83

ABBREVIATIONS

cif Cost, insurance and freight

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_11222

