

UNITED NATIONS CONFERENCE ON TRADE AND DEVELOPMENT  
Geneva

**Review  
of Maritime Transport,  
1988**

*Report by the UNCTAD secretariat*



UNITED NATIONS  
New York, 1989

## 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, for consideration at the fourteenth session of the Committee. Any factual and editorial corrections that may prove necessary in the light of comments made by the Committee at that session 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 acknowledgement 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.4/320

UNITED NATIONS PUBLICATION

*Sales No.* E.89.II.D.16

ISBN 92-1-112282-1  
ISSN 0566-7682

02000P

CONTENTS

		<u>Page</u>
Abbreviations .....		vii
Explanatory notes .....		vii
Introduction .....		viii
Summary of main developments in 1988 .....		viii
<u>Chapter</u>	<u>Paragraphs</u>	<u>Page</u>
I. <u>The development of international seaborne trade ...</u>	1-5	1
II. <u>Development of the world fleet .....</u>	6-22	8
A. Size and ownership of the world fleet .....	6-12	8
B. Types of vessel .....	13-20	12
C. Age distribution of the world merchant fleet .	21	18
D. Comparison of cargo turnover and fleet ownership .....	22	18
III. <u>Productivity of the world fleet and the problem of tonnage oversupply .....</u>	23-32	23
A. Estimates of tons and ton-miles per dwt .....	23-24	23
B. Estimates of tonnage oversupply .....	25-32	26
IV. <u>Shipbuilding .....</u>	33-51	31
A. Ship prices .....	33-35	31
B. Tonnage on order .....	36-42	33
C. Deliveries of newbuildings .....	43-44	35
D. Demolition of ships .....	45-51	38
V. <u>Freight markets .....</u>	52-61	43
A. Freight rates of main cargo sectors .....	52-58	43
B. Liner freight rates as a percentage of prices of selected commodities .....	59-60	45
C. Estimates of global freight costs .....	61	47

CONTENTS (continued)

<u>Chapter</u>	<u>Paragraphs</u>	<u>Page</u>
VI. <u>Multimodal transport and technological developments</u>	62-129	50
A. Multimodal transport .....	62- 87	50
B. Technological developments .....	88-126	58
C. Other developments related to multimodal transport .....	127-129	65
VII. <u>Other developments</u> .....	130-152	66
A. United Nations Convention on a Code of Conduct for Liner Conferences .....	130-133	66
B. United Nations Convention on International Multimodal Transport of Goods .....	134	67
C. United Nations Convention on the Carriage of Goods by Sea (Hamburg Rules) .....	135	67
D. United Nations Convention on Conditions for Registration of Ships .....	136-137	67
E. UNCTAD Committee on Shipping .....	138-139	67
F. UNCTAD Model Clauses on Marine Hull and Cargo Insurance .....	140	68
G. Maritime liens and mortgages .....	141-142	68
H. Maritime fraud .....	143	68
I. UNCTAD Minimum Standards for Shipping Agents .	144	69
J. UNCTAD training programmes in shipping and ports .....	145-150	69
K. New Worldscale .....	151	70
L. Currency adjustment factors (CAF) .....	152	71

ANNEXES

	<u>Page</u>
I. Classification of countries and territories .....	74
II. World seaborne trade according to geographical areas, 1970, 1986 and 1987 .....	77
III. Merchant fleets of the world by flag of registration, groups of countries and types of ships, in grt and dwt, as at 1 July 1988	80

CONTENTS (continued)

LIST OF TABLES

<u>Table</u>		<u>Page</u>
1.	Development of international seaborne trade, 1970 and 1980-1988 ..	2
2.	World seaborne trade by types of cargo, 1970 and 1980-1988 .....	4
3.	World seaborne trade in 1970, 1986, 1987 and 1988 (est.) by types of cargo and country groups .....	5
4.	Distribution of world tonnage (grt and dwt) by groups of countries of registration, 1970, 1987 and 1988 .....	9
5.	Distribution of tonnage of open-registry fleets by major open-registry countries (grt and dwt), 1983-1988 .....	11
6.	World fleet by principal types of vessel, 1986-1988 .....	13
7.	Percentage shares of world tonnage by type of vessel and country groups (as at 1 July), 1980, 1985, 1987 and 1988 .....	14
8.	Distribution of the world fleet and TEU capacity of fully cellular containerhips by groups of countries, at mid-year 1986, 1987 and 1988 .....	17
9.	Container port traffic of developing countries and territories, 1986 and 1987 .....	19
10.	Age distribution of the world merchant fleet by type of vessel as at 1 July 1988 .....	21
11.	Comparison between total cargo turnover and fleet ownership by groups of countries, 1970 and 1985-1988 .....	22
12.	Cargo tonnage carried and ton-miles performed per dwt of the total world fleet, 1970 and 1980-1988 .....	23
13.	Estimated productivity of tankers, bulk carriers, combined carriers and the residual fleet, 1970 and 1980-1988 (ton-miles) .	24
14.	Estimated productivity of tankers, bulk carriers, combined carriers and the residual fleet, 1970 and 1980-1988 (tons) .....	25
15.	Tonnage oversupply in the world merchant fleet, 1975 and 1980-1988	27
16.	Analysis of tonnage oversupply by vessel type, 1980-1988 .....	28
17.	Tanker tonnage engaged in oil storage, 1981-1988 .....	30
18.	Major laid-up fleets by flag country as at mid-October 1988 .....	30

CONTENTS (continued)

<u>Table</u>	<u>Page</u>
19. Representative newbuilding prices, 1980 and 1985-1988 .....	32
20. Second-hand ship prices, 1986-1988 .....	33
21. World tonnage on order at the end of each quarter, 1986, 1987 and 1988 .....	34
22. World tonnage on order as at 30 September 1988 .....	36
23. Deliveries of newbuildings, 1986-1988 .....	37
24. Distribution of deliveries of newbuildings by groups of countries of build, 1986-1988 .....	38
25. Broken-up tonnage trends, 1980-1988 .....	39
26. Tonnage reported sold for breaking by type of vessel, 1981-1988 .	40
27. Tankers and combined carriers laid-up and idle and estimated as tonnage unlikely to trade again, 1985-1988 .....	41
28. Demolition prices in 1987-1988 .....	42
29. Average age of bulk carriers sold for demolition in 1981-1988 ...	42
30. Freight rate indices, 1986-1988 .....	44
31. The ratio of liner freight rates to prices of selected commodities, 1970 and 1983-1986 .....	46
32. Estimates of total freight costs in world trade by groups of countries, 1980, 1986 and 1987 .....	48
33. Operation of double-stack trains from/to the west coast of the United States and Canada .....	51
34. Load TEUs handled by Sotra to/from selected destinations, 1981-1987 .....	53
35. Other container train services .....	54
36. Sea-air traffic from Japan .....	56
37. Container production in 1987 .....	63

Graphs

1. International seaborne trade for selected years .....	3
2. World seaborne trade by country groups, 1988 .....	7
3. World fleet capacity by country groups, selected years 1970-1988 .	10
4. Freight as percentage of c.i.f. import values by country groups .	49

ABBREVIATIONS

CFS	Container freight station
cif	Cost, insurance, freight
dwt	Deadweight tons
EEC	European Economic Community
FEU	Forty-foot equivalent unit
fob	Free on board
GDP	Gross domestic product
GNP	Gross national product
grt	Gross registered tons
ICC	International Chamber of Commerce
ICD	Inland clearance depot
ISO	International Organisation for Standardization
LCL	Less than container load
LDT	Light displacement tons
LNG	Liquefied natural gas
LPG	Liquefied petroleum gas
LUF	Lifting unit frame
MTO	Multimodal transport operator
NVOCC	Non-vessel-operating common carrier
NVO-MTO	Non-vessel-operating multimodal transport operator
OBO	Oil/bulk/ore
OECD	Organisation for Economic Co-operation and Development
ro/ro	Roll-on/roll-off
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.

Tons refer to metric tons, unless otherwise stated.

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

Two dots (..) indicate that the 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, data shown for earlier years have been revised and updated, and may therefore differ from those shown in previous issues of this Review.

## INTRODUCTION

The Review of Maritime Transport is an annual publication prepared by the secretariat of UNCTAD, in accordance with section VI of the programme of work of the Committee on Shipping. \*/ The purpose of the Review is to outline and analyse the main developments in world maritime transport in the past year and to assess expected future short-term developments. Emphasis is given to the development of the merchant marines in developing countries as compared with other groups of countries.

### Summary of main developments in 1988

- (i) Growth in the international economy and the fall in oil prices in 1988 contributed in large part to the improvement of international seaborne trade and maritime transport.
- (ii) The total volume of international seaborne trade increased in 1988, with goods loaded estimated at 3.7 billion tons or 4.1 per cent more than in 1987. Thus, the gradual increase in international seaborne trade during the last five-year period has restored the total volume to approximately the 1980 level (3.7 billion tons).
- (iii) The declining trend in the size of the world merchant fleet continued in 1988. At mid-year 1988 the total deadweight of the world merchant fleet was 627.9 million tons, representing a decline of 4.4 million dwt or 0.7 per cent from the previous year's figure.
- (iv) Ownership remained concentrated in the developed market-economy and open-registry countries, with a combined tonnage amounting at mid-year 1988 to 67.8 per cent of the total deadweight of the world merchant fleet. The share of developing countries remained at the level of 1987, viz. 20.9 per cent. Socialist countries of Eastern Europe and Asia owned 10.2 per cent of the world merchant fleet.
- (v) The combined tonnage of the five major open-registry countries (Liberia, Panama, Cyprus, Bahamas, Bermuda) at mid-1988 stood at 220.2 million dwt or 35.0 per cent of the world merchant fleet and now exceeds the total tonnage registered in developed market-economy countries (205.9 million dwt).

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\\_11226](https://www.yunbaogao.cn/report/index/report?reportId=5_11226)

