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Review of Maritime Transport, 1983

Report by the UNCTAD secretariat^{*/}

^{*/} This review has been prepared by the UNCTAD secretariat in accordance with item V of the programme of work of the Committee on Shipping. It is being circulated initially in mimeographed form, in order that it should be at the disposal of Governments with the least possible delay. Subsequently, it will be issued as a United Nations publication, incorporating any factual and editorial corrections that may prove necessary in the light of comments received from Governments.

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ABBREVIATIONS

BAF	Bunker adjustment factor
b/d	Barrels per day
CAF	Currency adjustment factor
c.i.f.	Cost, insurance, freight
dwt	Deadweight tons
f.o.b.	Free on board
GDP	Gross domestic product
GNP	Gross national product
grt	Gross registered tons
LNG	Liquefied natural gas
LPG	Liquefied petroleum gas
OBO	Oil/bulk/ore
OECD	Organisation for Economic Co-operation and Development
pwc	Pakistan white cuttings
ro/ro	Roll-on/roll-off
TEU	Twenty-foot equivalent unit
ULOC	Ultra large crude carrier
VLCC	Very large crude carrier

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.

* * *

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INTRODUCTION

The Review of Maritime Transport is an annual publication prepared by the secretariat of UNCTAD, in accordance with section V 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 developments in developing countries, in particular, to the development of their merchant marines, and how they compare with developments in other groups of countries.

^{*/} Official Records of the Trade and Development Board, Tenth Session, Supplement No.5 (TD/B/301), annex III.

SUMMARY OF MAIN DEVELOPMENTS IN 1983

- (i) For the fourth consecutive year, the annual total volume of world seaborne trade declined. However, the last quarter of 1983 showed some improvement, as cargo volume was 3 to 4 per cent higher than in the first quarter.
- (ii) The size of the world merchant fleet at mid-1983 was 7.5 million deadweight tons less than the previous year, which is a significant change from its steady growth in earlier years.
- (iii) Ownership remains concentrated in developed-market economy countries and open-registry country fleets, whose combined tonnage represented 76.1 per cent of the mid-year 1983 world merchant fleet. The share of developing countries, however, increased to 15.3 per cent from 13.6 per cent in 1982, while that of the socialist countries remained unchanged.
- (iv) The low participation of developing countries in the world merchant fleet continued to be disproportional to their share of international seaborne trade. Specifically, in 1982 developing countries generated 37.9 per cent of world cargo moving in international seaborne trade but only owned 13.6 per cent of the deadweight tonnage. On the other hand, developed market-economy countries, either directly or indirectly through open-registry countries, owned 78.4 per cent of world tonnage while generating approximately 55 per cent of world trade.
- (v) The demand/supply disequilibrium of the world shipping industry continued in 1983 and is reflected by declines in productivity indicators (ton-miles/dwt).
- (vi) The freight markets also reflected the over-supply situation as many of the 1983 annual average freight rate indices were at a lower level than in the previous year except dry cargo tramp trip and crude tanker indices. The last quarter, however, showed some increases over the beginning of the year.
- (vii) The proportion of freight charges to c.i.f. import values for developing countries continued to be twice as high as that of developed market-economy countries (10.7 per cent and 5.3 per cent, respectively).

- (viii) The United Nations Code of Conduct for Liner Conferences entered into force on 6 October 1983, and, by the end of the year, 59 countries, representing 28.7 per cent of total world tonnage, had become Contracting Parties to the Convention.
- (ix) The Preparatory Committee for the United Nations Conference on Conditions for Registration of Ships continued work on the draft text for an international agreement and considered that it had sufficiently advanced its work for the holding of a plenipotentiary conference. The Conference will be held in July/August 1984.

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