



Distr.
GENERAL

TD/B/C.4/258
25 May 1983

Original: ENGLISH

United Nations Conference on Trade and Development

TRADE AND DEVELOPMENT BOARD
Committee on Shipping
Eleventh session

Review of Maritime Transport, 1982
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.

GE.83-55765

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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 totals, owing to rounding up.

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.

* * *

The designations employed and the presentation of the material in this document 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.

ABBREVIATIONS

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

INTRODUCTION

The Review of Maritime Transport is an annual publication prepared by the secretariat of UNCTAD in accordance with item 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 1982

- (i) World seaborne trade declined further by an estimated 8.4 per cent during 1982. Unlike the previous two years, when the downward trend was caused mainly by a contraction in the tanker trades, in 1982 the decline was recorded across-the-board for all commodities.
- (ii) The size of the world fleet remained almost unchanged. Among the groups of countries, the developing countries' share increased by 1.1 per cent to 13.6 per cent in 1982. However, the ownership remained concentrated, with 12 countries owning about 76 per cent of the group's total fleet. The developed market-economy and open-registry countries accounted for 78 per cent of the world fleet and the socialist countries' share was 7.5 per cent.
- (iii) According to 1980 figures (the latest available) developed market-economy countries, either directly or indirectly through open-registry countries, continued to own a disproportionately large share of the 1980 world fleet (82.4 per cent) in relation to the seaborne cargoes they generated (54.9 per cent) while the developing countries' share of the world fleet (10 per cent) was small in relation to the seaborne cargo they generated (38.5 per cent). For the socialist countries the share of fleet ownership (7.1 per cent) was basically the same as the share of seaborne cargo they generated (6.6 per cent).
- (iv) The severe disequilibrium in supply and demand for shipping tonnages was underlined by the low level of freight rates which prevailed in all the cargo sectors. There were less BAF and CAF increases in 1982 following a period of falling oil prices and a strengthening of the dollar.
- (v) Developing countries continued to bear significantly higher transport costs than the developed market-economy countries. In 1981 (the latest available estimate) 10 per cent of the total value of their imports was composed of

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