









UNCTAD





ii

NOTE

The *Review of Maritime Transport* is a recurrent publication prepared by the UNCTAD secretariat since 1968 with the aim of fostering the transparency of maritime markets and analysing relevant developments. Any factual or editorial corrections that may prove necessary, based on comments made by Governments, will 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 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, with reference to the document symbol (UNCTAD/RMT/2014). A copy of the publication containing the quotation or reprint should be sent to the UNCTAD secretariat at the following address: Palais des Nations, CH1211 Geneva 10, Switzerland.

UNCTAD/RMT/2014 UNITED NATIONS PUBLICATION

Sales no. E.14.II.D.5

ISBN 978-92-1-112878-9 eISBN 978-92-1-056861-6

ISSN 0566-7682

ACKNOWLEDGEMENTS

The *Review of Maritime Transport 2014* has been prepared by UNCTAD. The preparation was coordinated by Jan Hoffmann with administrative support and formatting by Wendy Juan, under the supervision of José María Rubiato, and the overall guidance of Anne Miroux. Contributors were Regina Asariotis, Hassiba Benamara, Poul Hansen, Jan Hoffmann, Anila Premti, José María Rubiato, Vincent Valentine and Frida Youssef. Substantive contributions were also received from John R. Moon and Pablo Achurra.

The publication was edited by John Rogers. The cover was designed by Sophie Combette and Nadège Hadjemian. The desktop publishing was carried out by Nathalie Loriot.

The considered comments and valuable input provided by the following reviewers are gratefully acknowledged:

Chapter 1: Clarkson Research Services and Tracy Chatman

Chapter 2: Clarkson Research Services, Pierre Latrille and Lefteris Papapostolou

Chapter 3: Nancy Drakou, Robert Piller and Ilias Visvikis

Chapter 4: Mary R. Brooks, Ki-Soon Hwang and Dong-Wook Song

Chapter 5: Mahin Faghfouri, Stephen Fevrier, André Stochniol and Matthew Wilson

Chapter 6: John R. Moon

Thanks are also due to Vladislav Chouvalov for reviewing the publication in full.



TABLE OF CONTENTS

Note			ii	
Ackr	nowledg	ements	iii	
List	of tables	s, figures and boxes	v	
Abbı	eviation	ns	viii	
Expl	anatory	notes	ix	
Vess	el grou	pings used in the Review of Maritime Transport	x	
Exec	cutive su	ımmary	xi	
1.	DEV	VELOPMENTS IN INTERNATIONAL SEABORNE TRADE	1	
	A.	World economic situation and prospects	2	
	B.	World seaborne trade	4	
	C.	Outlook	20	
2.	STRUCTURE, OWNERSHIP AND REGISTRATION OF THE WORLD FLEET			
	A.	Structure of the world fleet	28	
	B.	Ownership and operation of the world fleet	32	
	C.	Container-ship deployment and liner shipping connectivity	42	
	D.	Registration of ships	43	
	E.	Shipbuilding, demolition and new orders	46	
3.	FRE	GIGHT RATES AND MARITIME TRANSPORT COSTS	49	
	A.	Freight rates	50	
	B.	Some relevant developments in shipping finance: Private equity expansion	59	
4.	PORT DEVELOPMENTS			
	A.	Port throughput	66	
	B.	Terminal operations	67	
	C.	Port related developments	69	
	D.	Some current challenges facing ports	70	
	E.	Conclusions	74	

5 .	LEGA	L ISSUES AND REGULATORY DEVELOPMENTS	77
	A.	Important developments in transport law	78
	В.	Regulatory developments relating to the reduction of greenhouse gas emissions from international shipping and other environmental issues	80
	C.	Other legal and regulatory developments affecting transportation	85
	D.	Status of conventions	92
	E.	International agreements on trade facilitation	93
6.	MARI	TIME TRANSPORT IN SMALL ISLAND DEVELOPING STATES	105
	A.	Introduction	106
	B.	Remoteness from global shipping networks	106
	C.	Shipping services of small island developing states	107
	D.	Transport costs in small island developing states	109
	E.	Liner shipping connectivity	110
	F.	Disaster-risk reduction and climate-change adaptation	114
	G.	The way forward	116
		World subject arouth 2011 2014 (Applied paragraphs as about a)	0
	1.1.	World output growth, 2011–2014 (Annual percentage change)	2
	1.2.	Growth in the volume of merchandise trade, 2010–2013 (Annual percentage change)	4
	1.3.	Developments in international seaborne trade, selected years (Millions of tons loaded)	5
	1.4 (a).	World seaborne trade in 2006–2013, by type of cargo, country group and region (Millions of tons)	8
	1.4 (b).	World seaborne trade in 2006–2013, by type of cargo, country group and region (Percentage share)	10
	1.5.	Major producers and consumers of oil and natural gas, 2013 (Percentage world market share)	13
	1.6.	Some major dry bulks and steel: Main producers, users, exporters and importers, 2013 (Percentage world market share)	15
	1.7.	Estimated containerized cargo flows on major East—West container trade routes, 2009–2013 (Millions of TEUs and percentage annual change)	
	2.1.	World fleet by principal vessel types, 2013–2014 (Beginning-of-year figures, thousands of dwt, percentage share in italics)	29
	2.2.	Age distribution of the world merchant fleet, by vessel type, as of 1 January 2014 (Percentage of total ships and of dwt)	31
	2.3.	Ownership of the world fleet, as of 1 January 2014 (Dwt)	33
	2.4.	The 50 leading liner companies, 1 January 2014 (Number of ships and total shipboard capacity deployed, in TEUs, ranked by TEU)	40

			44
2	.6.	Distribution of dwt capacity of vessel types, by country group of registration, January 2014 (Beginning-of-year figures, per cent of dwt; annual growth in percentage points in italics)	45
2	.7.	Deliveries of newbuildings, major vessel types and countries where built, 2013 (Thousands of GT)	46
2	.8.	Tonnage reported sold for demolition, major vessel types and countries where demolished, 2013 (Thousands of GT)	47
3.	.1.	Container freight markets and rates	51
3.	.2.	Container-ship time charter rates (\$ per 14-ton TEU per day)	54
3	.3.	Baltic Exchange Tanker Indices	54
3.	.4.	Tanker market summary – clean and dirty spot rates, 2010–2014 (Worldscale)	56
3.	.5.	Selected recent private equity investments in shipping	61
4	.1.	Container port throughput for 80 developing countries/economies and economies in transition for years 2011, 2012 and 2013 (TEUs)	64
4	.2.	Top 20 container terminals and their throughput for 2011, 2012 and 2013 (TEUs and percentage change)	66
4	.3.	Top 10 global terminal operators, 2012 (TEUs and market share)	67
4.	.4.	Top global terminals, 2013 (Container moves per ship, per hour, on all vessel sizes, and throughput by port and country)	68
4	.5.	World's leading ports by productivity, 2013 (Container moves per ship, per hour, on all vessel sizes and percentage increase)	68
4	.6.	Types of pollution occurring in ports	73
5		Contracting States Parties to selected international conventions on maritime transport as at 30 June 2014	92
6		Container-ship fleet deployment for selected island economies, May 2014	111
Figure	es		
1.	.1.	The OECD Industrial Production Index and indices for the world: Gross domestic product, merchandise trade and seaborne shipments, 1975–2013 (1990 = 100)	3
1.	.2.	International seaborne trade, selected years (Millions of tons loaded)	6
1.	.3 (a).	World seaborne trade, by country group, 2013 (Percentage share in world tonnage)	6
1.	.3 (b).	Participation of developing countries in world seaborne trade, selected years (Percentage share in world tonnage)	7
1.	.3 (c).	World seaborne trade by geographical region, 2013 (Percentage share in world tonnage)	7
1.	.4.	World seaborne trade in cargo ton-miles by cargo type, 2000-2014 (Billions of ton-miles)	12
1.	.5 (a).	Global containerized trade, 1996–2014 (Millions of TEUs and percentage annual change)	17
1.	.5 (b).	Distribution of global containerized trade by route, 2011–2014 (Millions of TEUs)	18
1.	.5 (c).	Estimated containerized cargo flows on major East–West container trade routes, 1995–2013 (Millions of TEUs)	19

	۷.۱.	Alfindal growth of the world fleet, 2000–2013 (Percentage dwt)	20
	2.2.	World fleet by principal vessel types, 1980–2014 (Beginning-of-year figures, percentage share of dwt)	29
	2.3.	Trends in deliveries of geared container ships, 2005–2013 (New container ships with own container-handling gear, percentage of total container-ship deliveries)	30
	2.4.	Ownership of the world fleet, by year of construction (Dwt as of 1 January 2014)	32
	2.5.	Top 20 shipowning nations, beneficial ownership, 1 January 2014 (1,000 dwt, by country/economy of ownership)	39
	2.6.	Presence of liner shipping companies: Average number of companies per country and average container carrying capacity deployed (TEU) per company per country, 2004–2014	42
	2.7.	Fleet deployment per country: Total number of ships and average size (TEU) per ship, 2004–2014	43
	2.8.	World tonnage on order, 2000–2014 (Thousands of dwt)	47
	3.1.	Growth of demand and supply in container shipping, 2000–2014 (Annual growth rates)	50
	3.2.	New ConTex Index, 2008–2014	53
	3.3.	Baltic Exchange Dry Index, 2012–2014 (Index base year 1985 = 1,000 points)	58
	3.4.	Daily earnings of bulk carrier vessels, 2008–2014 (\$ per day)	59
	5.	Number of existing national trade-facilitation bodies (Year of creation)	93
	6.1.	Interregional container flows, 2011 (Thousands of TEUs)	106
	6.2.	Main East-West shipping route and location of largest container ports	107
	6.3.	Expenditures on international transport as a percentage of the value of imports, average 2004–2013	109
	6.4.	Liner Shipping Connectivity Index, selected Caribbean SIDS, 2004–2014	112
	6.5.	Liner Shipping Connectivity Index, selected Indian Ocean SIDS, 2004–2014	112
	6.6.	Liner Shipping Connectivity Index, selected SIDS and other island economies of the Pacific Ocean, 2004–2014	113
Box	xes		
	5.1.	The current status of the ISO 28000 series of standards	90
	5.2	Types of national trade facilitation hadies	05

预览已结束, 完整报告链接和二

https://www.yunbaogao.cn/report/index/report?re