

UNITED NATIONS CONFERENCE ON TRADE AND DEVELOPMENT
Geneva

REVIEW OF MARITIME TRANSPORT 2009

Report by the UNCTAD secretariat

UNITED NATIONS
New York and Geneva, 2009

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 number (see below). A copy of the publication containing the quotation or reprint should be sent to the UNCTAD secretariat at the following address: Palais des Nations, CH-1211 Geneva 10, Switzerland.

UNCTAD/RMT/2009

UNITED NATIONS PUBLICATION

Sales No. E.09.II.D.11

ISBN 978-92-1-112771-3

ISSN 0566-7682

ACKNOWLEDGEMENTS

The *Review of Maritime Transport 2009* is prepared by the Trade Logistics Branch of the Division on Technology and Logistics, UNCTAD. The principal authors were Regina Asariotis, Hassiba Benamara, Jan Hoffmann, Eugenia Núñez, Anila Premti, and Vincent Valentine, who also leads the team of authors.

Contributions on various issues were also prepared by Liliana Annovazzi-Jakab, Bismark Sitorus and Birgit Viohl. Desktop publishing and administrative support was provided by Florence Hudry. Graphic support was provided by Nadège Hadjemanian and the publication was edited by Daniel Sanderson.

Various parts of this publication were peer-reviewed by UNCTAD colleagues: Deepali Fernandes, Mina Mashayekhi, Anne Miroux, José María Rubiato and Frida Youssef.

This publication was peer-reviewed by the following persons from civil society, according to their particular expertise: Alf Baird, Tom Butterly, Pierre Cariou, Mahindokht Faghfouri, Matthew Flynn, Hercules Haralambides, Ki-Soon Hwang, Harsh Khare, Mohamed Abul Kheir, Shashi Kumar, Heather Leggate, Socrates Leptos-Bourgi, Nora Neufeld, Melissa-Dawn Newhook, Adolf Ng, Thomas Pawlik, Aleksandra Pieczek, Derek Prentis, Sheri Rosenow, Wayne Talley, Beatriz Tovar de la Fe and Les Ward.

CONTENTS

	Page
Acknowledgements.....	iii
List of tables, figures and boxes.....	vi
Abbreviations and explanatory notes.....	x
Vessel groupings used in the <i>Review of Maritime Transport</i>	xiii
Executive summary.....	xiv
Chapter	Page
1. Developments in international seaborne trade	1
A. World economic situation and prospects.....	1
B. World seaborne trade.....	6
C. Sectors of world seaborne trade	13
D. Maritime transport and the climate change challenge.....	26
2. Structure, ownership and registration of the world fleet	37
A. Structure of the world fleet.....	37
B. Ownership of the world fleet.....	52
C. Registration of ships.....	54
D. Shipbuilding, demolition and the second-hand market.....	57
3. Productivity of the world fleet, and supply and demand in world shipping	75
A. Operational productivity	75
B. Supply and demand in world shipping.....	79
C. Comparison of cargo turnover and fleets	81
4. Trade and freight markets	85
A. Crude oil and petroleum products shipping market	85
B. Liquefied natural gas	90
C. Dry bulk shipping market.....	92
D. The liner shipping market	98
E. Container production.....	103

5.	Port and multimodal transport developments	109
A.	Container port traffic	109
B.	Improvements in port performance.....	114
C.	Recent port developments.....	114
D.	Inland transport developments	117
E.	UNCTAD Liner Shipping Connectivity Index 2009.....	121
6.	Legal issues and regulatory developments	123
A.	Important developments in transport law.....	123
B.	Negotiations on trade facilitation at WTO	130
C.	Other legal and regulatory developments affecting transportation	133
D.	Status of conventions	148
7.	Review of Regional developments: Africa	159
A.	Economic background.....	159
B.	African ports: some improvements and more expected.....	163
C.	African shipping networks and liner shipping connectivity in Africa: a difficult path.....	166
D.	Trade facilitation issues in Africa.....	169
E.	Special case: transit and inland transport for landlocked developing countries in Africa.....	174

Annexes

I.	Classification of countries and territories.....	181
II.	World seaborne trade by country groups.....	185
III (a).	Merchant fleets of the world by flags of registration, groups of countries and types of ship, as of 1 January 2009 (in thousands of GT).....	187
III (b).	Merchant fleets of the world by flags of registration, groups of countries and types of ship, as of 1 January 2009 (in thousands of dwt)	193
IV.	UNCTAD Liner Shipping Connectivity Index.....	199

LIST OF TABLES, FIGURES AND BOXES

<i>Table</i>		<i>Page</i>
1.	World economic growth, 2006–2009	2
2.	Growth in the volume of merchandise trade, by geographical region, 2006–2008	6
3.	Development of international seaborne trade, selected years	8
4.	World seaborne trade in 2006–2008, by type of cargo and country group	9
5.	World seaborne trade in ton-miles, selected years	14
6.	Estimated cargo flows on major trade routes, 2007–2008	26
7.	Estimates of fuel consumption, CO ₂ emissions from international shipping, and projected growth..	29
8.	World fleet size by principal types of vessel, 2008–2009	39
9.	Long-term trends in the cellular container ship fleet	39
10.	Geared and gearless fully cellular container ships built in 2007 and 2008.....	40
11.	Age distribution of the world merchant fleet, by vessel type, as of 1 January 2009	41
12.	The 35 countries and territories with the largest controlled fleets (dwt), as of 1 January 2009	53
13.	The 35 flags of registration with the largest registered deadweight tonnage, as of 1 January 2009... .	55
14.	Distribution of dwt capacity of vessel types, by country group or registration, 2009	56
15.	True nationality of 10 major open and international registry fleets, as of 1 January 2009	58
16.	Deliveries of newbuildings, selected years	62
17.	Tonnage reported sold for breaking, by vessel type, 2000–2008.....	64
18.	Average age of broken-up ships, by type, 1998 to 2008	65
19.	World tonnage on order, 2000–2009	66
20.	Representative newbuilding prices in selected years	69
21.	Second-hand prices for five-year-old ships, 2000–2008.....	69
22.	Newbuilding contract terminations	71
23.	Cargo carried and ton-miles performed per deadweight ton (dwt) of the total world fleet, selected years	76
24.	Estimated productivity of tankers, bulk carriers and the residual fleet, selected years (tons carried per dwt)	76
25.	Estimated productivity of tankers, bulk carriers and the residual fleet, selected years (thousands of ton-miles performed per dwt).....	77
26.	Tonnage oversupply in the world merchant fleet, selected years.....	79

27. Analysis of tonnage surplus by main type of vessel, selected years.....	80
28. Maritime engagement of 25 major trading nations.....	83
29. Tanker freight indices, 2007–2009.....	86
30. Tanker market summary: clean and dirty spot rates, 2007–2009	88
31. Dry cargo freight indices, 2006–2009.....	97
32. The 20 leading service operators of container ships at the beginning of 2009.....	100
33. Container ship time charter rates	102
34. Freight rates (market averages) per TEU on the three major liner trade routes.....	104
35. Liner freight indices, 2009–2009	105
36. World container fleet.....	105
37. Container port traffic for 63 developing economies, 2006, 2007 and 2008.....	111
38. Top 20 container terminals and their throughput for 2006, 2007 and 2008.....	113
39. The global terminal operators equity share of world container throughput.....	116
40. Total length of navigable waters and tons of goods transported by inland waterways.....	118
41. Rail: International transport of goods for selected countries	119
42. Countries and regions with total rail networks of 20,000 km and above.....	120
43. Share of intraregional trade in total African trade.....	163
44. Performance indicators	165
45. Indicators of African countries' connectivity in liner shipping.....	168
46. Selected indicators of border administration efficiency in Africa.....	170
47. Global Enabling Trade Index, Africa, 2008	172
48. Major African regional economic communities.....	173

Figure

1 (a). World GDP growth, 2003–2009, selected countries	3
1 (b). Indices for world economic growth (GDP), OECD Industrial Production Index and world seaborne trade (volume), 1994–2009.....	4
2. Indices for world economic growth (GDP) and world merchandise exports (volume), selected years.....	7
3. International seaborne trade, selected years.....	11
4 (a). World seaborne trade, by country group and region, 2008	12

4 (b). Developing countries' seaborne trade, selected years	12
5. Oil and natural gas: major producers and consumers, 2008	16
6 (a). Major bulks (steel and iron ore): producers, consumers and traders in 2008	20
6 (b). Major bulks (coal and grain): producers, consumers and traders in 2008	21
7. Global container trade, 1990–2020	25
8. Shipping sector CO ₂ emission and CO ₂ efficiencies by cargo carrier.....	28
9. World fleet by principal vessel types, selected years	38
10. Geared and gearless fully cellular container ships by age	40
11. Age profile of world fleet, all vessel types.....	43
12. Age profiles of world fleet for eight major vessel types	44
13. Age profiles of world fleet: major flags of registration of developing countries, countries with economies in transition, and open and international registries located in developing countries.....	45
14. Age profiles of world fleet: developing countries and countries with economies in transition among the major 35 vessel-owning countries.....	49
15. Deliveries of newbuildings, 1997–2008.	63
16. World tonnage on order, 2000–2009	68
17. Ton-miles per deadweight ton (dwt) of the world fleet, selected years	77
18. Tons carried per deadweight ton (dwt) of the world fleet, selected years.....	78
19. Ton-miles per deadweight ton (dwt) of the world fleet, by vessel type, selected years.....	78
20. Trends in surplus capacity by main vessel types, selected years	81
21. Growth of demand and supply in container shipping, 2000–2009	82
22. Evolution of prices of new containers.....	106
23. Evolution of leasing rates.....	107

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_9946

