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Review of maritime transport, 1984

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NOTE

This review has been prepared by the UNCTAD secretariat in accordance with item V of the programme of work of the Committee on Shipping, for consideration at the twelfth 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.

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ABBREVIATIONS

BAF	Bunker adjustment factor
b/d	Barrels per day
CAF	Currency adjustment factor
cif	Cost, insurance, freight
dwt	Deadweight tons
fob	Free on board
GDP	Gross domestic product
GNP	Gross national product
GRT	Gross registered tons
LDT	Light displacement tons
lng	Liquefied natural gas
LPG	Liquefied petroleum gas
OBO	Oil/bulk/ore
OECD	Organisation for Economic Co-operation and Development
ro/ro	Roll-on/roll-off
TEU	Twenty-foot equivalent unit
ULOC	Ultra large crude carrier
VLCC	Very large crude carrier

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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 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.

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 the development of the merchant marines in developing countries as compared with other groups of countries.

In order to facilitate the interpretation of some detailed tables, a number of computer-generated graphs have been introduced. The explanatory texts in relation to these graphs, however, often use non-standard abbreviations because of the format required by the computer programme.

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

SUMMARY OF MAIN DEVELOPMENTS IN 1984

(i) For the first time in five years the total volume of international seaborne trade increased and reached a level of 3.3 billion tons in 1984. This marks a significant reversal of the trend which characterized the 1980-1984 period, as the volume of goods loaded increased 6.7 per cent over 1983.

(ii) Conversely, the size of the world fleet declined by mid-1984 to 674.5 million dwt, as compared to 686.0 million dwt in mid-1983, with the fleets of developed market-economy countries experiencing the largest decline (19.0 million dwt) from the previous mid-year figures.

(iii) Ownership remained concentrated in developed market-economy countries and open-registry fleets, whose combined tonnage represented 75.0 per cent of the 1984 mid-year world merchant fleet (on dwt basis), as compared to 76.1 per cent as at mid-year 1983. The 1984 percentage share for developing countries, however, increased slightly to 15.9 per cent from 15.3 per cent in 1983, while that of the socialist countries of Eastern Europe and Asia remained about the same as in the previous year.

(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 1984, developing countries generated 37 per cent of world cargo moving in international seaborne trade but only owned 15.9 per cent of the deadweight tonnage. On the other hand, developed market-economy countries, either directly or indirectly through open-registry countries, owned 75.0 per cent of world tonnage while generating 56 per cent of world trade.

(v) While the demand/supply disequilibrium remained the shipping industry's main problem, the surplus of tonnage and laid-up dwt decreased from the previous year.

(vi) Except for the liner freight and the dry cargo tramp trip charter indices, all freight rate indices experienced a minimal change over the 12-month period.

(vii) The proportion of freight charges to 1983 c.i.f. import values for developing countries continued to be twice as high as that of developed market-economy countries (10.8 per cent and 5.4 per cent, respectively).

(viii) The United Nations Conference on Conditions for Registration of Ships held the first part of its session from 16 July to 3 August 1984 and made considerable progress on a composite text showing draft articles for an international agreement (two further sessions are to be held in January and July 1985, respectively).

(ix) Two liner companies introduced round-the-world container services during the last quarter of 1984.

Chapter I

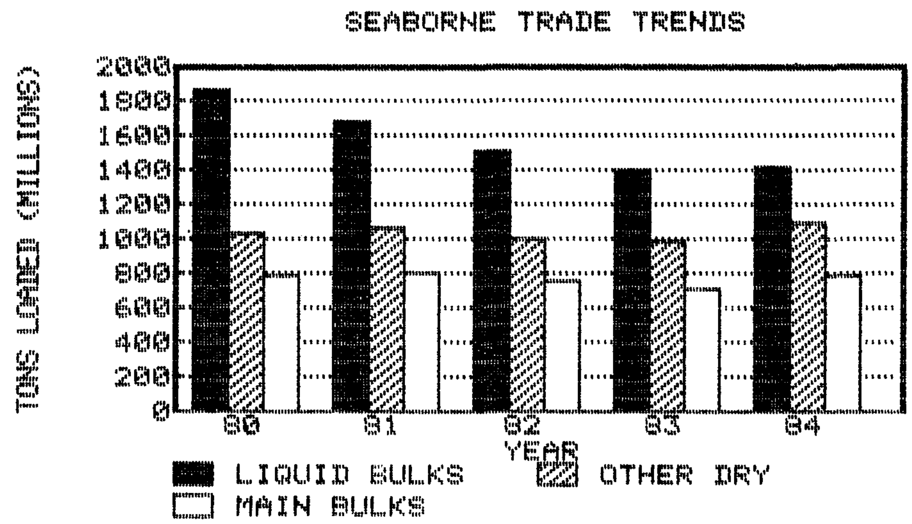
THE DEVELOPMENT OF INTERNATIONAL SEABORNE TRADE

1. As shown in table 1, 1984 marked the first time in five years that the total volume of international seaborne trade increased to reach a level of 3.3 billion tons. This is a significant trend reversal in the volume of goods loaded (up 6.7[1/] per cent over 1983) during the 1980-1984 period. Tanker cargoes in 1984 showed a slight increase over 1983, but were still 23.7 per cent less than in 1980. Dry cargo, however, reached record volumes in 1984 (1.9 billion tons) with both main bulk commodities and other dry cargo increasing by more than 10.6 per cent over 1983 (see graph 1 for trends by major cargo groups).

Graph 1

World seaborne trade: 1980-1984

Estimates of goods loaded in millions of tons



2. Trends in ton-miles are equally important to the demand for shipping services and are summarized in table 2. Total 1984 ton-miles increased 3.8 per cent over 1983. Liquid hydrocarbons' share of the 1984 total ton-miles declined to 42.1 per cent, while the proportion of main dry bulk commodities (iron ore, coal, grain, bauxite/alumina and phosphates) amounted to 29.6 per cent. The changes from 1983 reflect the greater use of shorter-haul routes for petroleum shipments, as more production shifted from Middle East suppliers to producers closer to major consumption centres in Europe, and the recent expansion of the world iron and steel industry. For purposes of comparison, world seaborne trade of selected bulk cargoes (crude oil and petroleum products, coal, iron ore and grain) for the period 1980-84 is shown in graph 2.

1/ See table 1.

Table 1

Development of International seaborne trade, a/ 1970 and 1980-1984
(Estimates of goods loaded)

Year	Tanker cargo		Dry cargo: Total		Dry cargo: Of which: main bulk commodities b/		Total (all goods)	
	Millions of tons	Percentage increase/decrease over previous year	Millions of tons	Percentage increase/decrease over previous year	Millions of tons	Percentage increase/decrease over previous year	Millions of tons	Percentage increase/decrease over previous year
1970	1 440	13.1	1 165	13.0	488	16.0	2 605	13.0
1980	1 871	-6.6	1 833	3.3	796	4.5	3 704	-2.0
1981	1 693	-9.5	1 866	1.8	806	1.3	3 559	-3.9
1982	1 480	-12.6	1 793	-3.9	759	-5.8	3 273	-8.0
1983	1 400	- 7.4	1 710	-2.8	714	-5.9	3 110	-5.2
1984 (est)	1 427	1.9	1 893	10.7	790	10.6	3 320	6.7

Sources : (i) For tanker cargo, total dry cargo and all goods, base data were communicated to the UNCTAD secretariat by the United Nations Statistical Office. Owing to possible subsequent revisions or other factors, these detailed data may differ marginally from the aggregated figures reported in the United Nations, Monthly Bulletin of Statistics, January issues.

(ii) For main bulk commodities: Foarnleys, World Bulk Trades 1983 (Oslo), and Review 1984.

a/ Including international cargoes loaded at ports of the Great Lakes and St. Lawrence system for unloading at ports of the same system, but excluding such traffic in main bulk commodities. Also including petroleum imports into the Netherlands Antilles and Trinidad and Tobago for refining and re-export.

b/ Iron ore, grain, coal, bauxite/alumina and phosphate.

Table 2

World seaborne trade by types of cargo, 1970 and 1980-1984

(Billions of ton-miles)

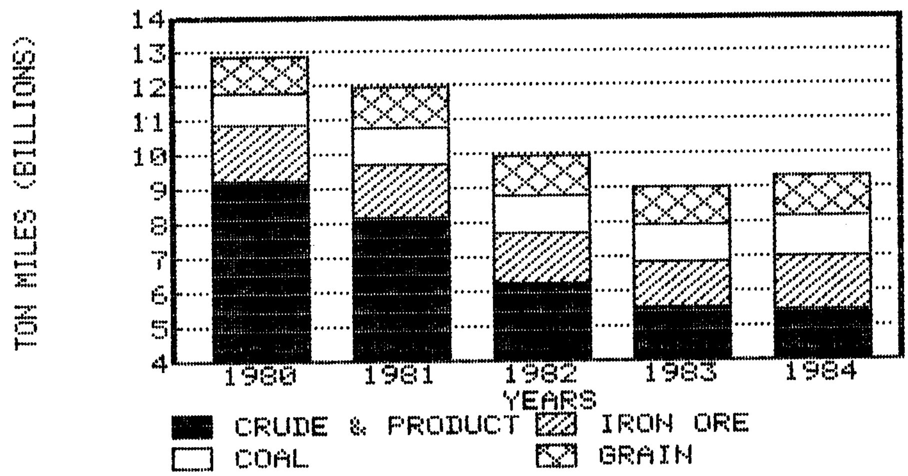
Year	Crude oil	Oil product	Iron ore	Coal	Grain[a]	Other cargo	Total trade
1970	5,597	890	1,093	481	475	2,118	10,654
1980	8,219	1,020	1,613	952	1,087	3,720	16,611
1981	7,193	1,000	1,508	1,120	1,131	3,710	15,662
1982	5,212	1,070	1,443	1,094	1,120	3,560	13,499
1983	4,478	1,080	1,320	1,057	1,135	3,510	12,580
1984	4,450	1,050	1,510	1,200	1,150	3,700	13,060

Source: Fearnley, Review 1984 (Oslo).
a/ Including wheat, maize, barley, oats, rye, sorghum and soya beans.

Graph 2

World seaborne trade of selected bulk cargoes, 1980-1984

(Billions of ton-miles)



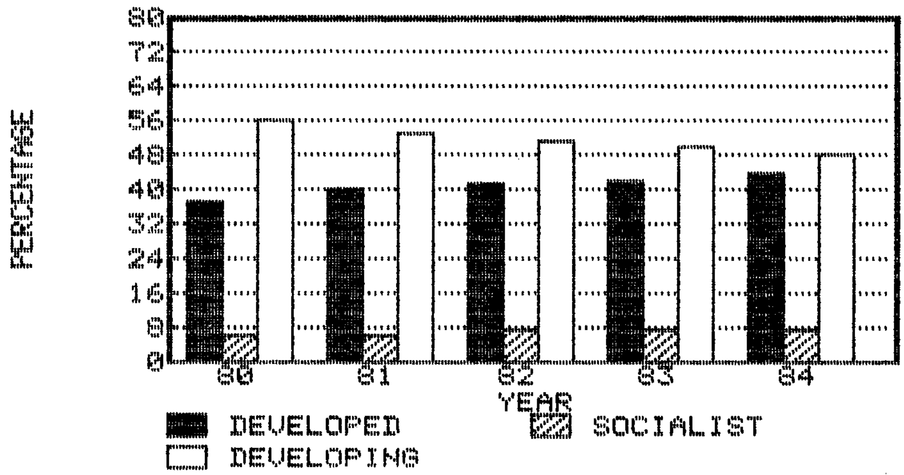
3. The distribution of world seaborne trade by goods loaded and unloaded, broad commodity classifications and country groupings is given in table 3. Globally, the dry cargo segment represents 57.0 per cent of the loaded goods in 1984, while crude oil comprises 32.6 per cent. The 1984 country grouping data indicate that developing countries generate 48.5 per cent of all goods loaded and 25.4 per cent of all goods unloaded, while developed market-economy countries generate 44.1 per cent of all goods loaded and 68.0 per cent of all goods unloaded. The socialist countries' shares are 7.4 per cent of the goods loaded and 6.6 per cent of the goods unloaded. The percentage shares of goods loaded and unloaded combined are 37, 56 and 7, respectively.

4. Over the 1980-1984 period the percentage share of goods loaded from developing countries declined from 56.3 per cent to 48.5 per cent. Conversely, developed market-economy countries increased their share of goods loaded from 37.0 per cent to 44.1 per cent (see graph 3). During the same five years (1980-1984) the percentage share of goods unloaded in developed market-economy countries decreased from 70.5 per cent to 68.0 per cent but developing countries increased their share of unloaded goods from 22.8 per cent to 25.4 per cent (see graph 4). For socialist countries the percentage share of both goods loaded and unloaded remained almost unchanged during the 1980-1984 period.

Graph 3

World seaborne trade loaded by country groups, 1980-1984

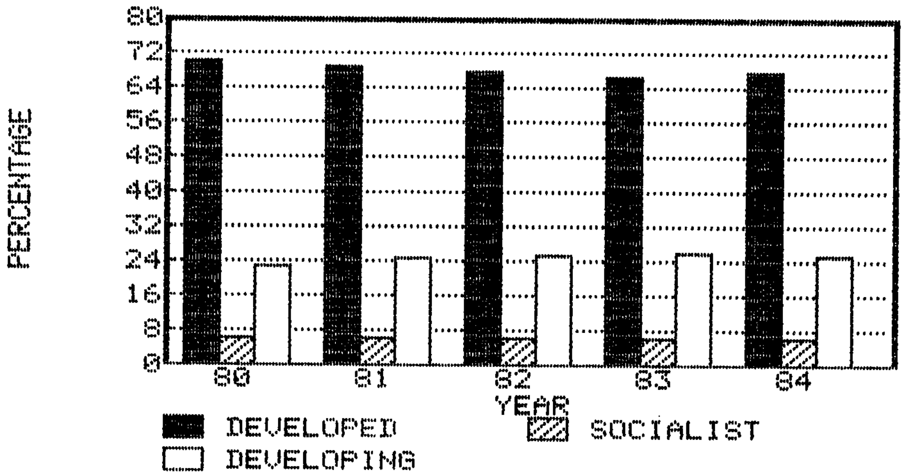
(percentage of world volume total)



Graph 4

World seaborne trade unloaded by country groups, 1980-1984

(percentage of world volume total)



5. For developing countries, 1984, as compared with the previous year, marked a continuing decline in the share of world seaborne trade (see graphs 3 and 4). For example, in 1983 the developing countries accounted for 50.3 per cent of goods loaded and 48.5 per cent in 1984. Similarly, in the goods unloaded category, the 1984 percentage share is 25.4 as compared to 26.2 in 1983.

Table 3

World seaborne trade, a/ 1970, 1982, 1983 and 1984 (est.) by types of cargo and shares of groups of countries b/
(Millions of tons and percentages of world total)

Country group	Year	Goods loaded				Goods unloaded			
		Petroleum		Dry cargo	Total all goods	Petroleum		Dry cargo	Total all goods
		Crude	Products			Crude	Products		
		(Trade in millions of tons)							
World total	1970	110	330	1 165	2 605	1 101	302	1 127	2 530
	1982	1 163	350	1 760	3 273	1 283	330	1 780	3 393
	1983	1 053	347	1 710	3 110	1 158	327	1 738	3 223
	1984	1 083	344	1 893	3 320	1 188	325	1 790	3 303
		(Percentage share of each category of goods in total)							
World total	1970	42.6	12.7	44.7	100.0	43.5	11.9	44.6	100.0
	1982	35.5	10.7	53.8	100.0	37.8	9.7	52.5	100.0
	1983	33.8	11.2	55.0	100.0	35.9	10.1	53.9	100.0
	1984	32.6	10.4	57.0	100.0	36.0	9.8	54.2	100.0
		(Percentage share of trade by groups of countries)							
Developed market-economy countries	1970	2.0	27.1	60.0	31.1	80.4	79.6	79.5	79.9
	1982	8.4	29.6	65.3	41.3	68.3	77.4	65.6	67.8
	1983	8.8	29.7	65.0	42.0	67.0	77.6	65.0	67.0
	1984	9.2	29.7	66.7	44.1	67.1	77.8	66.8	68.0
Socialist countries of Eastern Europe and Asia	1970	3.4	8.0	8.1	6.1	1.7	1.1	5.8	3.5
	1982	6.6	17.2	6.0	7.4	3.5	1.8	9.6	6.5
	1983	7.1	17.3	6.1	7.7	3.5	1.8	9.8	6.7
	1984	7.2	17.3	5.7	7.4	3.5	1.8	9.6	6.6
Of which:									
in Eastern Europe	1970	3.4	8.0	6.9	5.6	1.2	1.0	3.7	2.3
	1982	5.3	15.6	4.8	6.1	2.3	0.6	6.0	4.1
	1983	5.7	15.7	4.9	6.4	2.3	0.6	6.1	4.2
	1984	5.8	15.7	4.6	6.1	2.3	0.6	6.0	4.1
in Asia	1970	-	-	1.2	0.5	0.5	0.1	2.1	1.2
	1982	1.3	1.6	1.2	1.3	1.2	1.2	3.6	2.4
	1983	1.4	1.6	1.2	1.3	1.2	1.2	3.7	2.5
	1984	1.4	1.6	1.2	1.3	1.2	1.2	3.6	2.5
Developing countries	1970	94.5	64.7	31.9	62.8	17.9	17.8	15.1	16.7
	1982	85.0	53.2	28.7	51.3	28.2	20.8	24.8	25.7
	1983	84.1	53.0	28.9	50.3	29.5	20.6	25.2	26.2
	1984	83.6	53.0	27.6	48.5	29.4	20.4	23.6	25.4

(contd)

Table 3 (cont'd)

Of which: c/										
in Africa	1970	25.4	2.4	9.1	15.2	1.7	4.1	3.6	2.9
	1982	21.5	8.0	4.6	10.9	7.9	2.5	5.3	6.0
	1983	21.6	7.9	4.6	10.6	7.7	2.3	5.1	5.7
in America	1970	12.2	36.2	13.8	16.0	10.5	5.1	4.4	7.2
	1982	12.6	17.3	12.5	13.1	11.9	6.0	5.0	7.7
	1983	12.8	17.3	12.5	13.2	12.4	6.0	5.0	7.7
in Asia	1970	56.9	27.0	8.2	31.3	5.5	7.9	6.7	6.4
	1982	50.9	27.8	11.2	27.1	8.2	11.5	14.3	11.8
	1983	49.7	27.6	11.4	26.2	9.3	11.6	14.9	12.6
in Europe	1970	...	-	-	...	-	0.1	0.1	...
	1982	...	-	...	...	-	0.2	...	...
	1983	...	-	...	...	-	0.2	...	...
in Oceania	1970	-	0.1	0.8	0.4	...	0.5	0.3	0.2
	1982	-	0.2	0.4	0.3	0.1	0.6	0.2	0.2
	1983	-	0.2	0.4	0.3	0.1	0.5	0.2	0.2

Source: UNCTAD data bank.
a/ See note a/ to table 1.
b/ See annex I below for the composition of these groups.
c/ Disaggregated estimates for 1984 are not yet available.

Chapter II

DEVELOPMENT OF THE WORLD FLEET

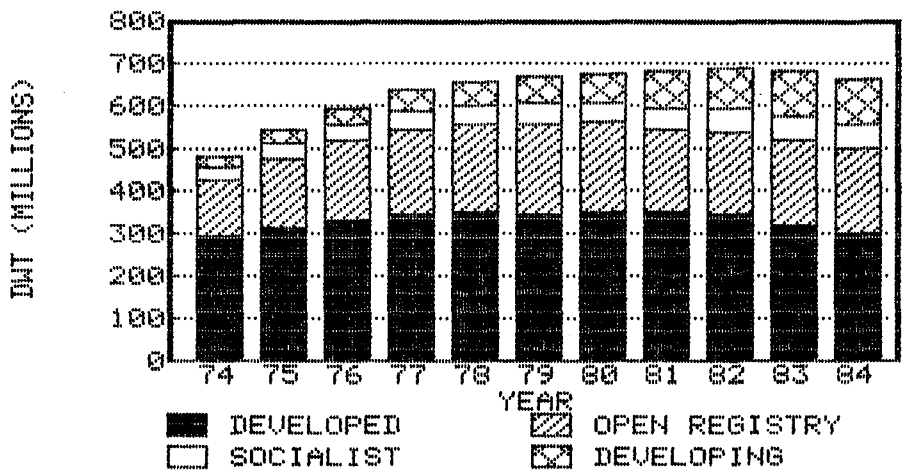
A. Size and ownership of world fleet

6. The world fleet by country groupings for the years 1970, 1983 and 1984 is shown in table 4. The recent declining trend in the size of the world fleet has continued since the 1982 peak of 693.5 million tons and total deadweight was 674.5 million tons at mid-year 1984. This represents an 11.5 million dwt decline from mid-year 1983, with the fleets of developed market-economy countries experiencing the largest drop (19.0 million dwt). By comparison both socialist and developing country fleets expanded slightly over the same period. Graph 5 illustrates the development of the world merchant fleet by groups of countries between 1974 and 1984.

Graph 5

World tonnage trends by country groups, 1974-84

(millions of dwt)



7. Table 4 and graph 5 also indicate that ownership remains concentrated in the developed market-economy countries and open-registry countries as 75.0 per cent of the mid-year 1984 deadweight is registered in these two groups. The developing countries' share, however, increased marginally to 15.9 per cent in 1984 from 15.3 per cent in 1983, while the socialist countries' share remained about the same as in 1983.

8. Tables 5 and 6 provide details of the linkage between open-registry fleets and four developed market economies, as of mid-year 1984. For example, true management is concentrated in four developed market-economy countries (United States, Japan, Greece, United Kingdom) and Hong Kong, which together account for 76.4 per cent of the total deadweight of the open-registry fleet. Similarly, the proportion of beneficial ownership of the open-registry fleet is also concentrated, as only four developed market-economy countries (United States, Greece, Japan, Norway) and Hong Kong account for 75.0 per cent of the 1984 deadweight (see table 6). Graphs 6 and 7 illustrate the concentration of true management and beneficial ownership in a few countries.

Table 4
Distribution of world tonnage a/ (grt and dwt) by groups of countries of registration, 1970, 1983 and 1984
(Mid-year figures)

Flags of registration in groups of countries	Tonnage and percentage shares b/						Increase in tonnage (millions of dwt)	
	In grt (millions)			In dwt (millions)				
	1970	1983	1984	1970	1983	1984	1970-1984- (Average)	1983-1984
World total	217.9 (100.0)	416.9 (100.0)	412.8 (100.0)	326.1 (100.0)	686.0 (100.0)	674.5 (100.0)	24.9	-11.5
Developed market-economy countries	141.8 (65.1)	197.3 (47.3)	187.3 (45.4)	211.9 (65.0)	322.4 (47.0)	303.4 (45.0)	6.5	-19.0
Open-registry countries	40.9 (18.8	107.3 (25.8)	110.0 (26.6)	70.3 (21.6)	199.8 (29.1)	202.2 (30.0)	9.4	2.4
Total 2 and 3	182.0 (83.9	304.6 (73.1)	297.3 (72.0)	282.2 (86.6)	522.2 (76.1)	505.6 (75.0)	16.0	-16.6
Socialist countries of Eastern Europe and Asia	19.5 (8.9)	43.1 (10.3)	43.5 (10.5)	21.7 (6.6)	54.4 (7.9)	55.4 (8.2)	2.4	1.0
Of which:								
in Eastern Europe	18.6 (8.5)	33.7 (8.1)	33.5 (8.1)	20.5 (6.2)	40.2 (5.9)	40.3 (6.0)	1.4	0.1
in Asia	0.9 (0.4)	9.4 (2.2)	10.0 (2.4)	1.2 (0.4)	14.2 (2.0)	15.1 (2.2)	1.0	0.9
Developing countries	14.5 (6.7)	66.3 (15.9)	68.0 (16.5)	20.5 (6.3)	104.9 (15.3)	107.1 (15.9)	6.2	2.2
Of which:								
in Africa	0.8	5.3	5.4	1.1	7.7	7.8	0.5	0.1
in America	6.4	14.9	14.8	8.7	22.3	22.2	1.0	-0.1
in Asia	7.3	45.0	46.1	10.7	73.4	74.6	4.6	1.2
in Europe	-	0.9	1.4	-	1.3	2.1	-	0.9
in Oceania	-	0.2	0.3	-	0.2	0.4	-	0.2
Other, unallocated	1.2 (0.5)	2.9 (0.7)	4.0 (1.0)	1.7 (0.5)	4.4 (0.7)	6.4 (0.9)	0.3	2.0

Source: Compiled on the basis of data supplied by the Shipping Information Services of Lloyd's Register of Shipping and Lloyd's of London Press Ltd.

a/ Excluding the United States Reserve Fleet and the United States and Canadian Great Lakes fleets, which in 1984 amounted respectively to 2.2, 1.7 and 2.0 million grt.

b/ Percentage shares are shown in brackets.

Table 5

True management a/ of open-registry fleets, 1984
(Number of vessels and thousands of dwt)

Country or territory of true managers \ Country or territory of registration	Liberia		Panama		Cyprus		Bahamas		Bermuda		TOTAL	
	Number	DWT	Number	DWT	Number	DWT	Number	DWT	Number	DWT	Number	DWT
United States of America	394	38 636	292	5 488	3	7	25	4 078	3	3	717	48 212
Hong Kong	452	28 467	635	14 106	3	34	1	14	2	4	1 093	42 625
Japan	202	10 264	916	11 935	1	5	-	-	-	-	1 119	22 204
Greece	136	9 385	452	7 212	328	4 818	2	60	2	19	920	21 494
United Kingdom-based Greek shipowners	75	5 444	54	2 273	37	2 737	-	-	-	-	166	10 453
United Kingdom	99	5 747	119	2 281	22	110	19	407	38	1 186	297	9 731
Monaco	36	3 727	34	2 615	-	-	1	29	-	-	71	6 371
Norway	123	4 559	44	865	2	623	5	196	1	13	175	6 256
Germany, Federal Republic of	85	2 151	183	3 121	82	668	1	6	1	7	352	5 953
Unspecified	45	1 652	161	2 790	-	-	-	-	-	-	206	4 442
Switzerland	52	2 991	87	1 180	5	58	1	2	-	-	145	4 231
United States-based Greek shipowners	26	1 673	8	68	3	494	-	-	-	-	37	2 235
Republic of Korea	10	989	74	1 158	-	-	-	-	-	-	84	2 147
Singapore	9	376	139	1 009	1	7	1	1	-	-	150	1 393
Netherlands	17	696	63	522	7	22	6	5	1	6	94	1 252
Italy	12	782	29	326	5	120	-	-	3	9	49	1 237
Indonesia	17	252	65	938	-	-	-	-	-	-	82	1 190
Israel	18	1 011	5	140	1	15	-	-	1	2	25	1 168
Denmark	21	766	17	59	5	16	17	251	-	-	60	1 092
70 countries, entities or territories, each managing less than 1 million dwt	63	3 027	369	2 311	45	406	16	87	10	149	503	5 980
Unidentified	10	335	210	1 683	46	854	1	-	3	4	270	2 876
TOTAL	1 902	122 930	3 956	62 080	596	10 994	96	5 136	65	1 402	6 615	202 542

Source: Based on data supplied to the UNCTAD secretariat by A. and P. Appledore Ltd.

a/ The "true manager" is the person, company or organization responsible for day-to-day husbandry of the ship concerned (as distinct from the manager of the company nominally owning the vessel). The country of management has been assumed to be the country of domicile of the true manager.

Table 6

Beneficial ownership a/ of open-registry fleets, 1984
(Number of vessels and thousands of dwt)

Country or territory of beneficial ownership / Country or territory of registration	Liberia		Panama		Cyprus		Bahamas		Bermuda		TOTAL	
	Number	DWT	Number	DWT	Number	DWT	Number	DWT	Number	DWT	Number	DWT
United States of America	366	38 151	304	7 447	3	7	25	4 078	16	83	714	49 766
Hong Kong	410	27 214	440	9 990	3	34	1	14	-	-	854	37 252
Greece	247	18 407	516	9 877	368	8 049	2	60	2	19	1 135	36 412
Japan	199	10 216	964	12 705	1	5	-	-	-	-	1 164	22 926
Norway	158	6 275	47	862	3	625	5	196	1	13	214	7 971
Germany, Federal Republic of	88	2 190	184	3 130	85	680	1	6	1	7	359	6 013
Unspecified	69	2 850	164	2 825	-	-	-	-	-	-	233	5 675
United Kingdom	39	2 348	128	1 935	16	60	16	377	22	843	221	5 563
Switzerland	57	3 322	82	1 268	5	58	1	2	-	-	145	4 650
China b/	5	171	114	2 926	-	-	-	-	-	-	119	3 097
Republic of Korea	10	989	73	1 156	-	-	-	-	-	-	83	2 145
Pakistan	38	1 292	25	466	-	-	-	-	-	-	63	1 758
Israel	25	1 356	5	140	2	32	-	-	1	2	33	1 530
Italy	16	950	34	380	5	120	-	-	3	9	58	1 459
Indonesia	21	309	68	1 015	-	-	-	-	-	-	89	1 324
Netherlands	18	729	60	481	7	22	8	7	-	-	93	1 239
Monaco	17	1 053	7	59	-	-	1	29	-	-	25	1 141
Denmark	21	766	16	55	5	16	17	251	-	-	59	1 088
Sweden	13	939	23	70	4	36	1	3	-	-	41	1 048
75 countries, entities or territories, each managing less than 1 million dwt	75	3 068	492	3 610	43	396	17	113	16	422	643	7 609
Unidentified	10	335	210	1 683	46	854	1	-	3	4	270	2 876
TOTAL	1 902	122 930	3 956	62 080	596	10 994	96	5 136	65	1 402	6 615	202 542
Share in total open-registry fleets	28.8	60.7	59.8	30.7	9.0	5.4	1.4	2.5	1.0	0.7	100.0	100.0

Source: Based on data supplied to the UNCTAD secretariat by A. and P. Appledore Ltd.

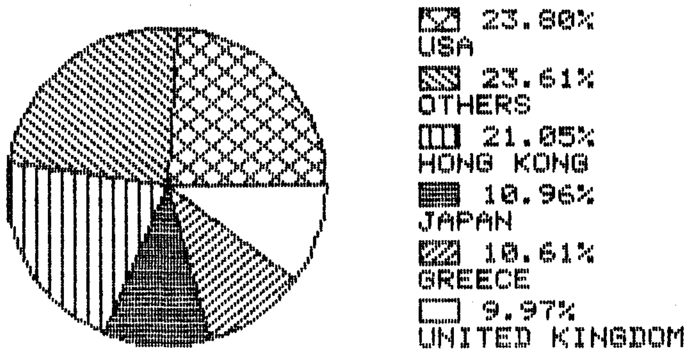
a/ The beneficial owner is the person, company or organization which gains the pecuniary benefits from the shipping operations.

b/ The Government has advised that many of the vessels attributed to China are chartered ships operated by the China Ocean Shipping Company.

Graph 6

True management of open-registry fleets

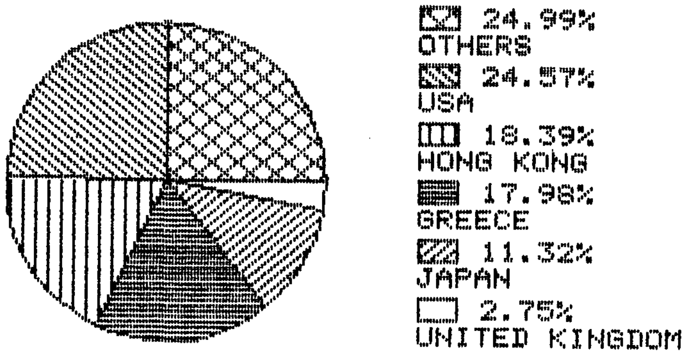
Mid-1984 - dwt distribution



Graph 7

Beneficial ownership of open-registry fleets

Mid-1984 - dwt distribution



B. Types of vessels

9. The world fleet by principal types of vessels in 1982, 1983 and 1984 as well as the percentage changes between 1983 and 1984 (mid-year figures) are detailed in table 7. Four types of vessels - oil tankers, bulk and combined carriers, general cargo and containerships - are the main categories whose combined deadweight represents 94.8 per cent of the mid-year 1984 world fleet. As shown in graph 8, the composition of the principal types has changed over the 1980-1984 period with oil tanker and general cargo deadweight declining 15.6 per cent and 5.6 per cent, respectively. Conversely, the deadweight of bulk carriers and containerships has increased by 15.5 per cent and 60.4 per cent, respectively.

Table 7

Analysis of the world fleet by principal types of vessel, 1982-1984 a/
(Thousands of dwt) b/

Principal types	1982	1983	1984	Percentage change 1983/1984
Oil tankers	325 243 (46.3)	306 094 (44.1)	286 786 (42.0)	-6.3
Liquified gas carriers	9 182 (1.3)	9 530 (1.4)	10 151 (1.5)	+6.5
Chemical carriers	5 040 (0.7)	5 361 (0.8)	5 791 (0.8)	+8.0
Miscellaneous tankers	443 (0.06)	480 (-)	439 (-)	-8.5
Bulk/oil carriers (inc. ore/oil carriers)	49 070 (7.0)	49 267 (7.1)	46 840 (6.9)	-5.0
Ore and bulk carriers	162 149 (23.1)	171 370 (24.7)	180 846 (26.5)	+5.5
General cargo (inc. passenger cargo)	116 307 (16.5)	114 615 (16.5)	111 286 (16.3)	-3.0
Container ships (fully cellular) and Lighter carriers c/	14 260 (2.1)	15 720 (2.2)	18 036 (2.6)	+14.7
Vehicle carriers	2 704 (0.4)	3 230 (0.5)	3 663 (0.5)	+13.4
Fish factories and carriers, and Fishing (inc. factory trawlers)	7 628 (1.1)	7 838 (1.1)	7 888 (1.2)	+0.6
Ferries and passenger vessels	2 471 (0.3)	2 516 (0.4)	2 552 (0.4)	+1.4
All other vessels	7 484 (1.1)	8 491 (1.2)	9 008 (1.3)	+6.1
World total (100.0)	701 980	694 512	683 286	-1.6

Source : Shipping Information Services of Lloyd's Register of Shipping and Lloyd's of London Press Limited, 1982-1984 (mid-year figures).

a/ The data in this table are not comparable with those in table 4, because they include the United States Reserve Fleet and the United States and Canadian Great Lakes fleets.

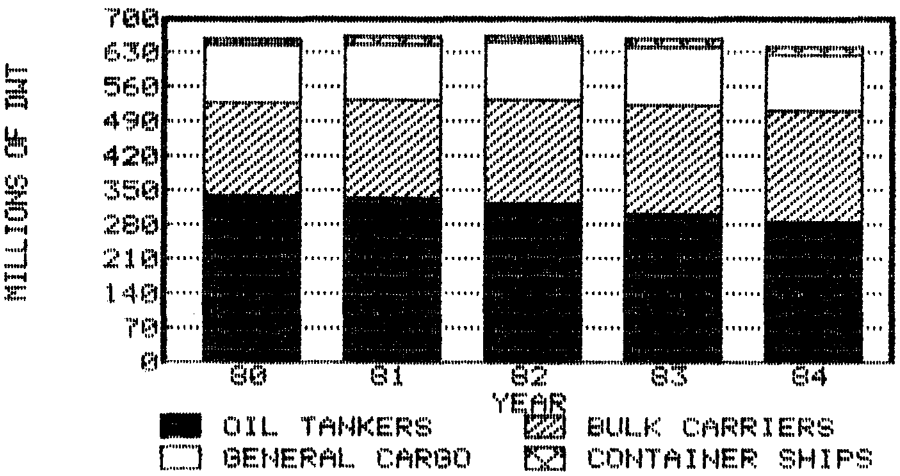
b/ Percentage shares are shown in brackets.

c/ As of 1984 data for container ships and lighter carriers have been combined by Lloyd's Shipping Information Services.

Graph 8

Principal types of ships in the world fleet, 1980-1984

(mid-year data - dwt millions)



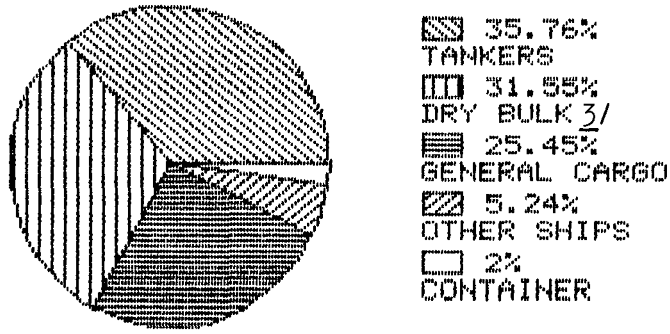
10. The comparative shares by country groups and by vessel types between 1980 and 1984 is shown in table 8. Developed market-economy countries had the largest portion (45.0 per cent) of deadweight for all types of vessels at mid-year 1984. Developing countries' total fleet deadweight continued to increase and now constitutes 15.9 per cent of the world deadweight (mid-year 1984); this represents a 56.6 per cent increase in deadweight in the last five years (1980-1984). By comparison, the socialist and open-registry countries' share of the world deadweight has remained fairly static over the same period.

11. The composition and concentration of the developing country fleet at mid-year 1984 is depicted by graphs 9 and 10. As shown in graph 9, bulk carriers predominate as tankers and dry bulk vessels combined comprise 67.3 per cent of the total. In terms of aggregate deadweight tonnage, 69.5 per cent of the vessels are registered in 10 developing countries or territories,2/ while the next 10 most important developing countries total 17.4 per cent of the dwt (see graph 10).

Graph 9

Developing countries' fleet by vessel type at mid-1984

(percentages on dwt basis)



2/ Republic of Korea, Singapore, India, Hong Kong, Brazil, Saudi Arabia, Philippines, Kuwait, Argentina, Iran.

3/ Includes combined carriers.

Table 8

Percentage shares of world tonnage by type of vessel and groups of countries (as at 1 July) 1980, 1982, 1983 and 1984 a/

(In terms of dwt)

Country group	Year	Total dwt: Millions of dwt	Total dwt: Percentage of world total	Tankers	Ore and bulk carriers b/ including combined carriers	General cargo ships c/	Container ships	Other ships
				Percentage share by vessel type				
World total	1980	682.8	100	49.7	27.2	17.0	1.6	4.5
	1982	693.5	100	46.8	29.7	16.4	1.9	5.2
	1983	686.0	100	44.5	31.4	16.4	2.1	5.6
	1984	674.5	100	42.4	33.0	16.1	2.7	5.8
				Percentage share by groups of countries				
Developed market-economy countries	1980	350.1	51.3	52.5	52.7	43.4	74.3	50.4
	1982	344.9	49.7	52.8	49.3	38.9	71.3	51.3
	1983	322.4	47.0	50.2	45.8	36.6	68.0	50.7
	1984	303.4	45.0	48.8	42.5	35.4	66.1	48.3
Open-registry countries	1980	212.5	31.1	36.2	31.7	20.8	13.5	17.0
	1982	198.7	28.7	32.6	30.8	19.4	10.1	17.2
	1983	199.8	29.1	33.3	31.4	20.0	10.0	17.2
	1984	202.2	30.0	34.8	31.9	20.5	11.7	18.8
Socialist countries of Eastern Europe and Asia	1980	48.7	7.1	3.4	5.8	17.0	3.0	20.5
	1982	52.0	7.5	3.6	5.9	18.5	2.7	18.1
	1983	54.4	7.9	3.9	6.3	19.2	4.0	17.5
	1984	55.4	8.2	3.9	6.8	19.9	4.7	17.0
Of which:								
in Eastern Europe	1980	37.8	5.5	2.8	4.2	12.3	2.9	19.2
	1982	39.0	5.6	3.0	4.0	12.9	2.6	16.9
	1983	40.2	5.9	3.1	4.2	13.3	2.9	16.4
	1984	40.3	6.0	3.0	4.5	13.7	3.5	15.7
in Asia	1980	10.9	1.6	0.6	1.6	4.7	0.1	1.3
	1982	13.0	1.9	0.6	1.9	5.6	0.1	1.2
	1983	14.2	2.0	0.8	2.1	5.9	1.1	1.1
	1984	15.1	2.2	0.9	2.3	6.2	1.2	1.3
Developing countries	1980	68.4	10.0	7.7	9.2	17.6	7.6	12.0
	1982	94.5	13.6	10.7	13.3	22.6	13.1	13.3
	1983	104.9	15.3	12.3	15.4	23.7	14.3	14.5
	1984	107.1	15.9	12.1	17.1	23.7	13.2	15.8
Of which:								
in Africa	1980	7.1	1.1	1.1	0.1	2.3	..	2.1
	1982	7.3	1.1	1.1	0.2	2.3	..	2.4
	1983	7.7	1.1	1.2	0.2	2.4	..	2.5
	1984	7.8	1.1	1.2	0.2	2.4	..	2.6
in America	1980	21.8	3.2	2.3	3.3	5.6	0.1	
	1982	21.2	3.0	2.2	3.0	5.7	0.1	3.3
	1983	22.3	3.3	2.6	3.1	5.8	0.1	3.5
	1984	22.2	3.3	2.8	2.9	5.8	0.3	3.6

(contd)

Table 8 (continued)

Country group	Year	Total dwt		Tankers	Ore and bulk carriers b/ including combined carriers	General cargo ships c/	Container ships	Other ships
in Asia	1980	39.1	5.7	4.3	5.7	9.8	2.7	
	1982	65.2	9.4	7.4	10.0	14.2	13.0	7.5
	1983	73.3	10.7	8.5	11.8	14.7	14.2	8.4
	1984	74.6	11.1	8.1	13.4	14.5	12.9	9.5
in Europe	1980	0.2	..	..	..	0.1	-	
	1982	0.6	0.1	..	0.1	0.3	-	..
	1983	1.3	0.2	..	0.3	0.7	-	..
	1984	2.1	0.3	..	0.5	0.8	-	..
in Oceania	1980	0.2	..	..	..	0.1	-	
	1982	0.2	..	..	..	0.1	-	0.1
	1983	0.2	..	..	..	0.1		0.1
	1984	0.4	0.1	..	0.1	0.2	-	0.1
Other, unallocated	1980	3.0	0.5	0.2	0.6	0.9	1.6	0.1
	1982	3.4	0.5	0.3	0.7	0.6	2.8	0.1
	1983	4.4	0.7	0.3	1.1	0.5	3.7	0.1
	1984	6.4	0.9	0.4	1.7	0.5	4.3	0.1

Source: Compiled on the basis of data supplied by the Shipping Information Services of Lloyd's Register of Shipping and Lloyd's of London Press Ltd.

a/ Excluding the United States Reserve Fleet and the United States and Canadian Great Lakes Fleets.

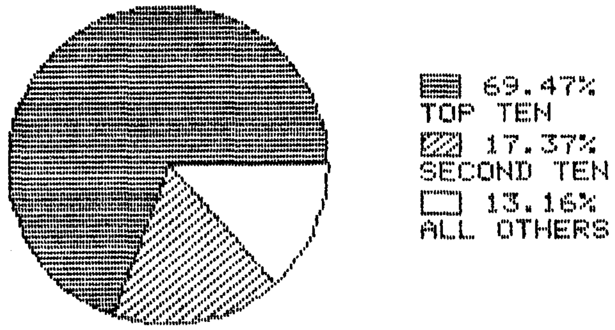
b/ Ore and bulk carriers of 6,000 grt and above, including combined ore/oil and ore/bulk/oil carriers.

c/ Including passenger cargo vessels.

Graph 10

Developing countries' fleet at mid-1984 (by dwt)

(percentage shares)

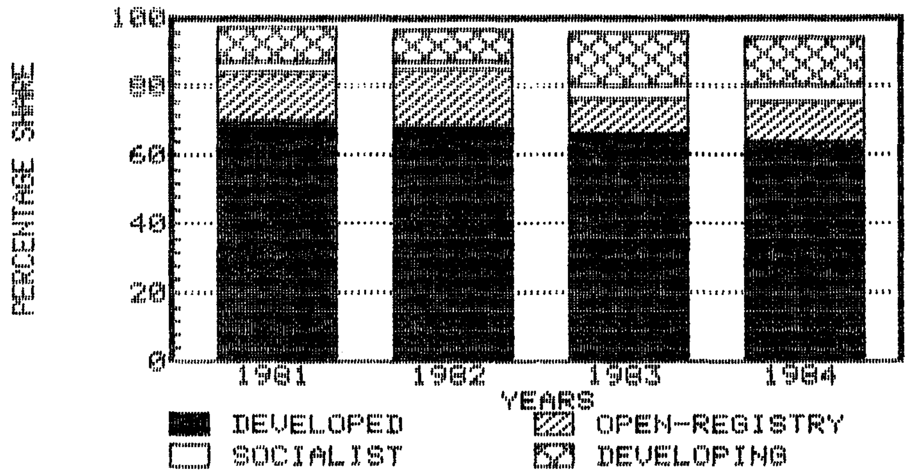


12. The distribution of the world container fleet and TEU capacity is presented in table 9. Significant supply changes have occurred, as both the number of containerships and more importantly TEU capacity have increased over the 1982-1984 period. The number of ships has increased by 25.3 per cent and TEU slots have expanded 39.1 per cent. Country grouping TEU shares remain concentrated in developed market-economy countries' fleets but developing countries have increased their share to 14.5 per cent of the mid-year 1984 total from 9.0 per cent mid-year 1982 (see graph 11). Within the developing countries' share, Asian countries account for 98.3 per cent of the TEU capacity.

Graph 11

TEU capacity by groups of countries, 1981-1984

(percentage shares)



13. Table 10 gives the latest available figures on world container port traffic in developing countries and territories for 1983 and data related to previous years. The world rate of growth for 1982/1983 was 7.3 per cent, which may be compared with that achieved in 1981/1982, which was only 4.1 per cent, but the rate of growth for all developing countries and territories shown was almost unchanged, remaining at a level slightly above 9.0 per cent. For these countries and territories, however, the growth was unevenly spread and frequently erratic from year to year.

Table 9

Distribution of world fleet and TEU capacity of fully cellular containerships by groups of countries, at mid-year 1982, 1983 and 1984

Flags of registration by groups of countries	Number of ships			TEU capacity and percentage shares a/		
	1982	1983	1984	1982	1983	1984
World total	718	786	900	598 120 (100.0)	697 459 (100.0)	832 112 (100.0)
Developed market-economy countries	431	454	496	412 490 (69.0)	461 608 (66.2)	532 229 (64.0)
Open-registry countries	153	127	161	94 765 (15.8)	74 603 (10.7)	100 217 (12.0)
Sub-total	584	581	657	507 255 (84.8)	536 211 (76.9)	632 446 (76.0)
Socialist countries of Eastern Europe and Asia	35	49	61	15 934 (2.7)	26 525 (3.8)	33 340 (4.0)
Of which:						
in Eastern Europe	33	39	49	15 280 (2.6)	19 861 (2.8)	23 902 (2.9)
in Asia	2	10	12	654 (0.1)	6 664 (1 0)	9 438 (1.1)
Developing countries	76	128	147	53 814 (9.0)	104 264 (14 9)	120 968 (14.5)
Of which:						
in Africa	-	-	-	-	-	-
in America	16	11	11	1 529 (0.3)	985 (0.1)	2 048 (0.2)
in Asia	60	117	136	52 285 (8.7)	103 279 (14.8)	118 920 (14.3)
in Europe	-	-	-	-	-	-
in Oceania	-	-	-	-	-	-
Other, unallocated	23	28	35	21 117 (3.5)	30 459 (4.4)	45 358 (5.5)

Source : Shipping Information Services of Lloyd's Register of Shipping and Lloyd's of London Press Ltd.
a/ Percentage shares are shown in brackets.

Table 10

Container port traffic of developing countries and territories, 1982 and 1983

Country or territory	Container traffic 1983 (TEUs)	Container traffic 1982 (TEUs)	Percentage change 1982/1983	Percentage change 1981/1982
Hong Kong	1,837,047	1,659,943	10.6	6.4
Singapore	1,274,317	1,116,288	14.1	4.9
Saudi Arabia	1,186,538	1,048,981	13.1	14.7
Republic of Korea	977,661	861,971	13.4	5.7
Philippines	721,575	684,575	5.4	15.9
United Arab Emirates a/	501,180	411,380	21.8	1.4
Brazil	363,975	264,783	37.5	16.1
Thailand	304,524	259,424	17.4	7.4
Malaysia	291,231	223,534	30.2	9.1
Kuwait	250,432	284,029	-11.8	27.9
India	234,614	215,680	8.8	6.0
Cyprus	183,016	180,652	1.3	25.9
Egypt	178,553	142,856	25.0	2.8
Jamaica	162,232	147,751	9.8	-19.6
Nigeria	151,755	239,906	-36.7	-7.1
Indonesia a/	143,631	158,352	-9.3	17.2
Pakistan	140,370	124,229	13.0	38.8
Ivory Coast	139,254	157,276	-11.4	-6.4
Sri Lanka	128,456	103,233	24.4	78.6
Argentina	120,173	95,050	26.4	-33.0
Panama	119,838	135,711	-11.7	4.2
Honduras	111,635	87,171	28.1	10.2
Trinidad and Tobago	99,909	99,193	1.0	52.9
Bahrain	94,844	92,963	2.0	-7.9
Lebanon	90,882	27,011	236.5	-29.5
Jordan	86,498	103,698	-16.6	37.3
Kenya	83,849	57,645	45.4	28.6
Mexico	80,541	121,294	-33.6	17.5
Guam	76,779	72,216	6.3	-7.5
Costa Rica	73,656	46,820	57.3	481.7
Guadeloupe	71,100	51,807	37.2	28.2
Chile	71,057	74,784	-5.0	-29.3
Dominican Republic	67,260	56,170	19.7	NA
Oman	67,194	44,999	49.3	52.6
Morocco	66,175	67,636	-2.2	14.5
Netherlands Antilles	63,188	74,669	-15.4	35.0
Cameroon	56,334	51,429	9.5	10.0
Papua New Guinea	54,580	59,189	-7.8	22.5
Venezuela	49,049	119,308	-58.8	NA
Bahamas	48,760	47,691	2.2	4.3
Syrian Arab Republic	46,808	48,831	-4.1	NA
Guatemala	38,725	36,292	6.7	5.8
Colombia a/	37,398	33,885	10.4	NA
Haiti	35,366	35,343	0.0	5.4
Ecuador	35,011	31,847	9.9	24.1
Peru	32,606	38,253	-14.8	37.9
Togo	31,894	34,004	-6.2	6.3
Others reported b/	410,039	361,721	13.0	6.2
Total reported by developing countries c/	11,491,509	10,491,473	9.5	9.2
World total reported	45,957,306	42,844,848	7.3	4.1

Source: Derived from information presented in Containerisation International Year Books 1984 and 1985.

a/ Data subject to omissions.

b/ Comprising 32 developing countries and territories where less than 30,000 TEUs were reported.

c/ Certain ports did not respond to the background survey; although they were not among the largest ports; the total omission can be estimated at 5-10 per cent.

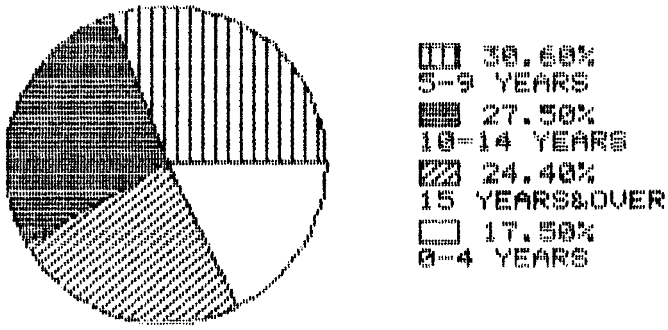
C. Age distribution of the world merchant fleet

14. Trends in the age distribution and country groupings of the world merchant fleet are detailed in table 11. The percentage distribution of the age groups is depicted in graph 12.

Graph 12

Age of the world fleet (grt), mid-year 1984

(percentage)



15. The mid-year 1984 average age of all ships remained about the same as 1983, with the average age increasing slightly to 11.16 years. Tankers were the youngest type of vessel (10.40 years) and general cargo ships the oldest (13.60 years). By country groupings, developed market-economy countries had the lowest average age (10.73 years) while socialist countries of Eastern Europe and Asia had the highest (13.47 years).

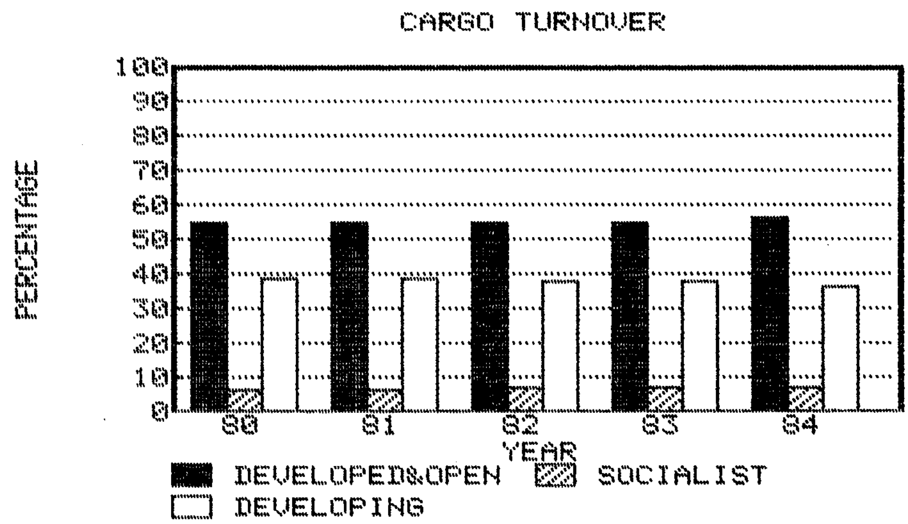
D. Comparison of cargo turnover and fleet ownership

16. Table 12 contains details of the relationship between cargo volumes generated by different groups of countries and fleet ownership. The table shows that developed market-economy and open-registry fleets continue to own a disproportionate share of the world merchant fleet compared to total cargo turnover. For example, in 1984 these two country groups generated 56.4 per cent of the world's international trade but jointly owned 75.0 per cent of the world's merchant fleet in deadweight tonnage. By comparison, the share of the developing countries in goods loaded and unloaded in world seaborne trade in 1984 was 36.6 per cent but their merchant fleet represented only 15.9 per cent of total world deadweight tonnage. The share of the socialist countries of Eastern Europe and Asia, on the other hand, was proportional to their share of the world's deadweight tonnage. Graph 13 illustrates the country groupings and compares the percentage of total cargo loaded and unloaded with the percentage of deadweight within each.

Graph 13

Comparison of cargo turnover and dwt by country groups, 1980-84

(percentage shares)



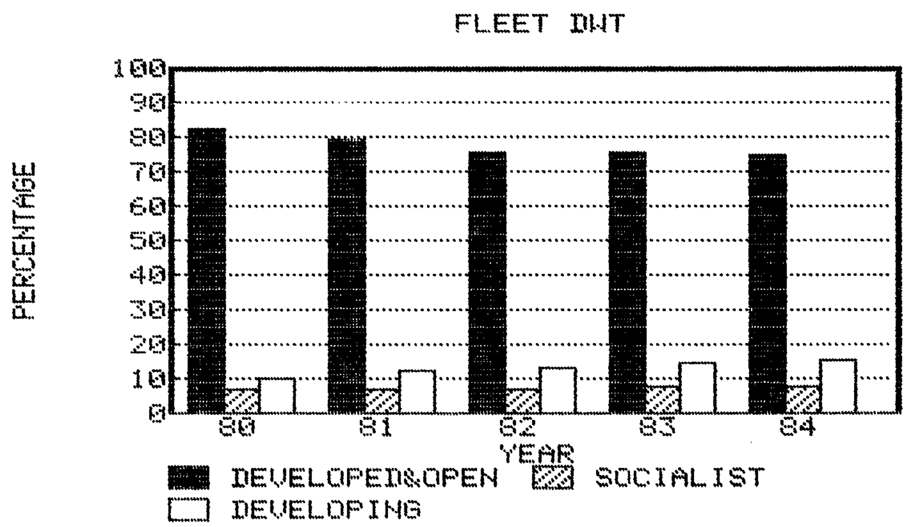


Table 11

Age distribution of the world merchant fleet by type of vessel as at 1 July 1984
(Percentage of total in terms of grt)

Country grouping	Type of vessel	Total	0-4 years	5-9 years	10-14 years	15 years and over	Average a/ age (years) July 1984	Average age (years) July 1983
World total	All ships	100	17.5	30.6	27.5	24.4	11.16	10.98
	Tankers	100	11.3	41.1	31.7	15.9	10.40	9.98
	Bulk carriers b/	100	23.4	24.8	29.7	22.1	10.63	10.61
	General cargo	100	13.9	24.3	19.7	42.1	13.60	13.58
Developed market-economy countries	All ships	100	18.5	31.4	28.6	21.5	10.73	10.61
	Tankers	100	11.6	40.4	32.0	16.0	10.42	10.05
	Bulk carriers b/	100	23.3	25.9	30.6	20.2	10.39	10.42
	General cargo	100	17.5	27.7	17.8	37.0	12.56	12.65
Open-registry countries	All ships	100	14.9	33.0	31.8	20.3	10.89	10.69
	Tankers	100	8.7	44.0	37.1	10.2	9.95	9.40
	Bulk carriers b/	100	22.2	22.8	31.4	23.6	11.00	11.11
	General cargo	100	11.1	23.5	23.2	42.2	13.93	14.18
Sub-total	All ships	100	17.2	32.0	29.8	21.0	10.78	10.63
	Tankers	100	10.4	41.8	34.1	13.7	10.24	9.80
	Bulk carriers b/	100	22.9	24.7	30.9	21.5	10.62	10.67
	General cargo	100	15.3	26.2	19.7	38.8	13.04	13.16
Socialist countries of Eastern Europe and Asia	All ships	100	15.4	23.8	18.8	42.0	13.47	13.29
	Tankers	100	11.6	28.0	12.2	48.2	14.26	13.98
	Bulk carriers b/	100	21.1	34.7	19.2	25.0	10.65	10.60
	General cargo	100	12.1	17.6	21.0	49.3	14.84	14.42
Developing countries (excluding open-registry countries)	All ships	100	19.8	29.8	22.8	27.6	11.29	11.05
	Tankers	100	15.8	41.9	23.9	18.4	10.16	9.68
	Bulk carriers b/	100	27.4	22.6	27.3	22.7	10.40	10.05
	General cargo	100	12.2	25.7	19.0	43.1	13.80	13.79

Source : Compiled on the basis of data supplied by the Shipping Information Services of Lloyd's Register of Shipping and Lloyd's of London Press Ltd.

a/ To calculate average age it has been assumed that the ages of vessels are distributed evenly between the lower and upper limit of each age group. For the 15 years and over age group, the mid-point has been assumed to be 22 years.

b/ Including combined carriers.

Table 12

Comparison between total cargo turnover and fleet ownership by groups of countries, 1970 and 1981 to 1984

(In terms of dwt)

Country grouping	Year	Goods loaded and unloaded (millions of tons)		Total of goods loaded and unloaded (millions of tons)	Deadweight tonnage of merchant fleet (millions of tons)	Percentage of world total of goods loaded and unloaded	Percentage of world total of merchant fleet owned (dwt)
		Loaded	Unloaded				
Developed market-economy and open-registry countries	1970	802.7	2 010.4	2 812.1	282.2	54.8	86.5
	1981	1 447.2	2 430.3	3 877.5	549.5	54.9	79.8
	1982	1 370.7	2 305.3	3 676.0	543.6	55.1	78.4
	1983	1 327.6	2 162.1	3 489.7	522.2	55.1	76.1
	1984	1 484.4	2 249.0	3 733.4	505.6	56.4	75.0
Socialist countries of Eastern Europe and Asia	1970	158.8	87.6	264.4	21.7	4.8	6.7
	1981	233.5	217.7	451.2	50.7	6.4	7.4
	1982	242.3	221.1	463.4	52.0	7.0	7.5
	1983	239.4	217.3	456.7	54.4	7.2	7.9
	1984	245.3	218.7	464.0	55.4	7.0	8.2
Developing countries	1970	1 643.3	431.6	2 074.9	20.5	40.4	6.3
	1981	1 896.7	867.4	2 764.1	85.9	39.1	12.5
	1982	1 660.4	866.2	2 526.6	94.5	37.9	13.6
	1983	1 543.0	843.6	2 386.6	104.9	37.7	15.3
	1984	1 590.3	835.3	2 425.6	107.1	36.6	15.9
World total a/	1970	2 604.8	2 529.6	5 134.4	326.1	100.0	100.0
	1981	3 555.4	3 511.9	7 067.3	688.8	100.0	100.0
	1982	3 273.4	3 392.6	6 666.0	693.5	100.0	100.0
	1983	3 110.0	3 223.0	6 333.0	686.0	100.0	100.0
	1984	3 320.0	3 303.0	6 623.0	674.5	100.0	100.0

Source: UNCTAD data bank.

a/ Including unallocated tonnage indicated in annex II.

Chapter III

PRODUCTIVITY OF THE WORLD FLEET

A. Estimates of tons and ton-miles per dwt

17. Two productivity indicators for the world fleet are given in table 13. Both confirm that the long-term decline was reversed in 1984 as tons of cargo carried per dwt was 4.92 (as compared to 4.53 in 1983) and ton-miles performed per dwt amounted to 19.36 (as compared to 18.34 in 1983). When only the active world fleet is considered, (e g, all vessels over 300 dwt that are not laid-up), the tons of cargo carried per dwt increased to 5.40 tons in 1984 from 5.08 tons in 1983[4/]. Productivity indicators according to types of carriers are shown in tables 14 and 15.

Table 13

Cargo tonnage carried and ton-miles performed per dwt of the total world fleet, 1970 and 1976-1984

Year	World fleet (millions of dwt)	Total cargo carried (millions of tons)	Total ton-miles performed (thousands of millions of ton-miles)	Tons of cargo carried per dwt	Ton-miles performed per dwt (thousands)
1970	326.1	2,605	10,654	7.99	32.67
1976	601.2	3,391	17,053	5.64	28.36
1977	642.3	3,453	17,476	5.38	27.21
1978	662.8	3,461	17,022	5.22	25.68
1979	673.7	3,778	17,675	5.61	26.24
1980	682.8	3,704	16,777	5.42	24.47
1981	688.8	3,555	15,840	5.16	22.99
1982	693.5	3,273	13,699	4.72	20.46
1983	686.0	3,110	12,850	4.53	18.34
1984	674.5	3,320	13,060	4.92	19.36

Sources: World fleet: Lloyd's Register of Shipping: Statistical Tables (London), various issues (mid-year figures); total cargo carried: United Nations, Monthly Bulletin of Statistics, January issues; ton-miles: Fearnley's Review (Oslo), various issues.

4/ Based upon world fleet less laid-up tonnage divided into total world seaborne trade for 1983 and 1984.

Table 14

Estimated productivity of tankers, bulk carriers, combined carriers a/ and the residual fleet b/
(ton-miles performed per dwt, 1970 and 1976-1983)

Year	Ton-miles of oil and grain by tankers (thousands of millions) c/	Ton-miles per dwt of tankers (thousands)	Ton-miles of dry bulk cargo by bulk carriers (thousands of millions)	Ton-miles per dwt of bulk carriers (thousands)	Ton-miles of oil and dry bulk cargo by combined carriers (thousands of millions)	Ton-miles per dwt of combined carriers (thousands)	Ton-miles of the residual fleet b/ (thousands of millions)	Ton-miles per dwt of the residual fleet (thousands)
1970	6 039	43.82	1 891	39.40	745	52.46	1 979	15.69
1976	10 335	33.71	2 917	29.11	1 660	36.64	2 141	14.36
1977	10 527	32.16	3 088	27.35	1 685	35.55	2 176	14.16
1978	9 950	30.16	3 387	27.76	1 524	31.36	2 161	13.31
1979	9 997	30.52	3 575	28.58	1 665	34.19	2 438	14.14
1980	9 007	27.56	2 009	14.47	1 569	32.43	4 192	24.83
1981	8 009	24.80	2 169	14.73	1 518	32.14	4 144	24.26
1982	5 412	17.42	2 422	14.96	1 310	29.05	4 555	26.28
1983	4 478	15.32	2 640	11.87	1 016	21.69	4 446	25.73

Sources: Compiled on the basis of Fearnley and Egers Chartering Co. Ltd., Review, World Bulk Trades and World Bulk Fleet, various issues.

a/ As from 1980 the data cover bulk carriers and combined bulk carriers of over 40,000 dwt as against 18,000 dwt in the previous years. The change affects figures for the bulk carrier fleet and consequently the residual fleet, but the combined bulk fleet is not affected as the combined bulk fleet of size range 18,000 dwt - 40,000 dwt forms only 0.3 per cent of the total combined bulk fleet.

b/ The "residual fleet" refers to all vessels included in table 4, excluding tankers, bulk carriers and combined bulk carriers of the size range indicated in footnote a/.

c/ Excludes grain since 1982,because data are not available.

Table 15

Estimated productivity of tankers, bulk carriers, combined carriers and the residual fleet, a/
(tons carried per dwt, 1970 and 1976-1983)

Year	Tons of oil and grain by tankers (millions)	Tons per dwt of tanker	Tons of dry bulk cargo by bulk carriers of over 18 000 dwt (millions)	Tons per dwt of bulk carriers	Tons of oil and dry bulk cargo by combined carriers of over 18 000 dwt (millions)	Tons per dwt of combined carriers	Tons carried by the residual fleet (millions)	Tons per dwt of the residual fleet
1970	1 182	8.58	403	8.40	97	6.83	800	6.34
1976	1 563	5.10	607	6.06	244	5.39	910	6.10
1977	1 591	4.86	643	5.70	268	5.65	921	5.99
1978	1 589	4.82	675	5.53	261	5.37	966	5.95
1979	1 681	4.82	728	5.82	308	5.82	1 038	6.02
1980	1 564	4.79	396	2.85	282	5.83	1 406	8.33
1981	1 419	4.39	421	2.86	262	5.53	1 404	8.22
1982	1 043	3.60	455	2.61	232	5.40	1 302	7.51
1983	930	3.25	490	2.20	196	4.18	1 312	7.59

Sources: As for table 13.

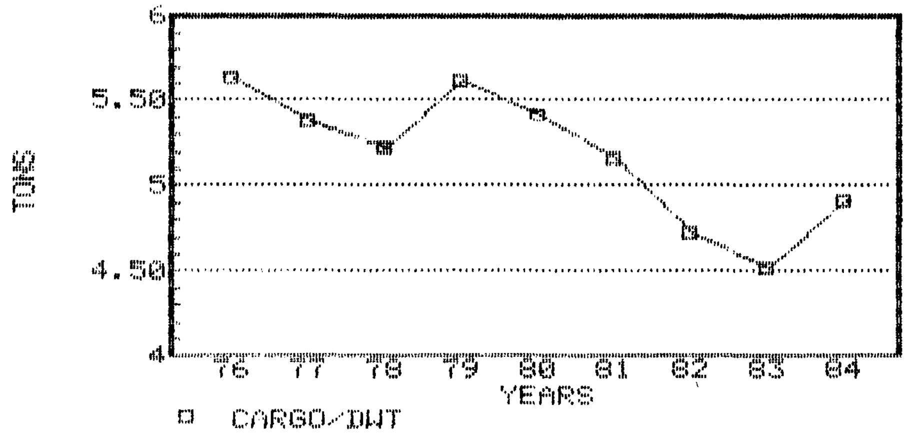
a/ See footnote a/ in table 13.

18. The principal reason for these declining trends in productivity, with the exception of 1979 and 1984, is the structural disequilibrium of the international shipping market. The decline in world trading activities decreased the demand for shipping services during the 1979 to 1983 period, but the supply of shipping continued to expand through 1982. However, by 1983 the overall size of the world fleet started to decline and this continued in 1984. World trade volumes, on the other hand, expanded in 1984, leading to an increase in productivity (see graph 14).

Graph 14

Productivity trends for world fleet, 1976-1984

(tons of cargo carried per dwt)



B. Estimates of tonnage over-supply

19. The basic demand/supply disequilibrium problem that has characterized the world shipping industry in recent years showed some moderate improvement in 1984. By ship type, over-supply conditions were still most noticeable in the tanker sector because ton-mile demand for liquid hydrocarbons was well below that of previous peak periods, and tanker fleet capacity, even though reduced by about 6.3 per cent between mid-1983 and mid-1984, was still estimated to be 110.4 million[5/] deadweight tons in surplus[6/] in December 1984 (composed of (in million dwt): slow steaming: 38.4; laid-up: 48.1; idle: 23.9). In the dry bulk sector, surplus tonnage at the end of 1984 was 22.8 per cent or about 50.1 million tons deadweight[7/] (composed of (in million dwt): slow steaming: 38.1; laid-up: 6.6; idle: 5.4). For the general cargo and unitized category the balance was closer to equilibrium, as the December 1984 percentage of surplus vessels was only 8.4. A comparison by principal vessel types is shown in graph 15.

5/ Based on Lloyd's Shipping Economist, volume 7, No 1, London, January 1985.

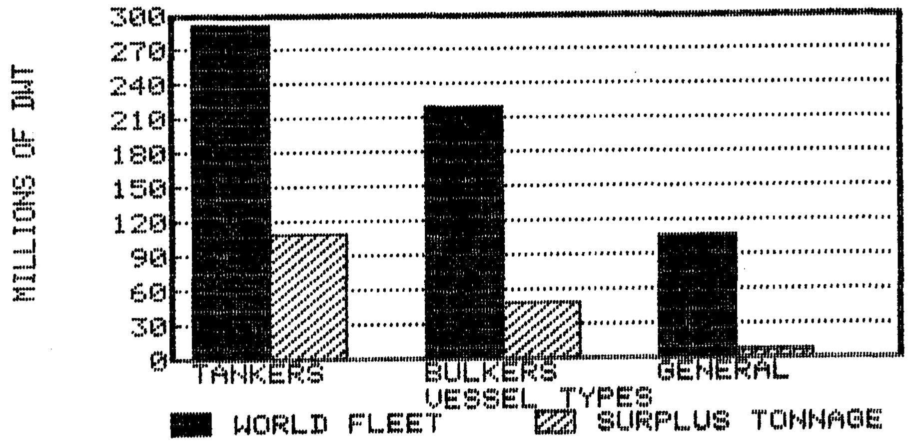
6/ Surplus tonnage defined as tonnage which is not fully utilized owing to slow steaming, lay-up status, or lying idle for reasons other than lay-up (i e, casualty, storage, under repair, etc.)

7/ Ibid.

Graph 15

Surplus tonnage by principal vessel type, year-end 1984[8/]

(millions of dwt)

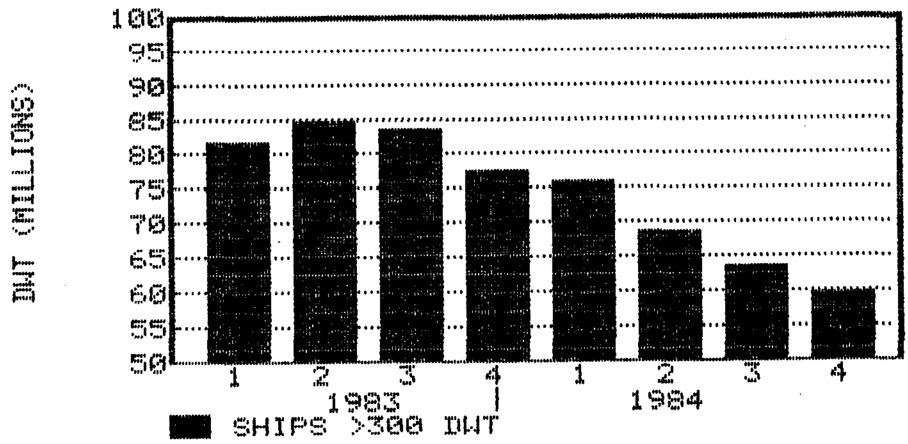


20. An important aspect of the disequilibrium conditions in the market is world laid-up tonnage (i.e. inactive ships laid up for lack of employment). By year-end 1984 the laid-up tonnage amounted to 59.65 million deadweight tons, which is 23.15 per cent less than the fourth quarter figure for 1983 (see graph 16). The effect of the decrease in laid-up tonnage is to increase the supply of active tonnage in the world freight market, and thus exacerbate the over-supply problem.

Graph 16

Laid-up tonnage trends[9/] by quarters, 1983 and 1984

(millions of dwt)



8/ Ibid. In this graph, "general" includes unitized vessels and "tankers" includes combined vessels.

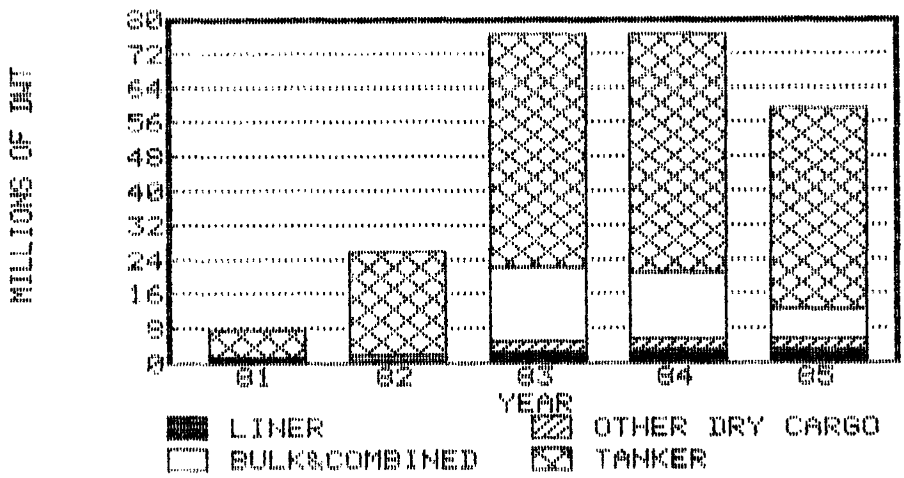
9/ See Institute of Shipping Economics, Bremen, Shipping Statistics, January 1985.

21. Comparative data for the combined laid-up tonnage of the principal types of vessels in the world fleet over the last five years (as at January of each year 1981 to 1985) indicate that the peak years for lay-up were in 1983 and 1984 (76.7 and 76.6 million dwt, respectively) and that tanker tonnage predominated. In addition, dry bulk carriers and combination oil/dry bulk vessels were a significant portion of the laid-up fleet during the 1983-1985 period. This is illustrated in graph 17. As noted previously, the explanation for the massive increase in the laid-up fleet can be traced to the continuing supply of new tonnage that was delivered in the 1983-1984 period and the contraction of world trade during the same period. Conversely, the recent expansion of world trade during 1984 and the decline in the delivery during 1984 of tankers and bulk/oil carriers (see table 19) has reduced the lay-up fleet for these two types of vessels in 1984. Nevertheless, overtonnaging remains the most serious problem for the international shipping industry as large amounts of surplus tonnage continue to exist for all major categories of vessels (as shown in graph 15).

Graph 17

Laid-up tonnage by selected vessel types, January 1981 to January 1985 10/

(dwt millions)



10/ Institute of Shipping Economics, Shipping Statistics Yearbook 1984 and Shipping Statistics, February 1985.

Chapter IV

SHIPBUILDING

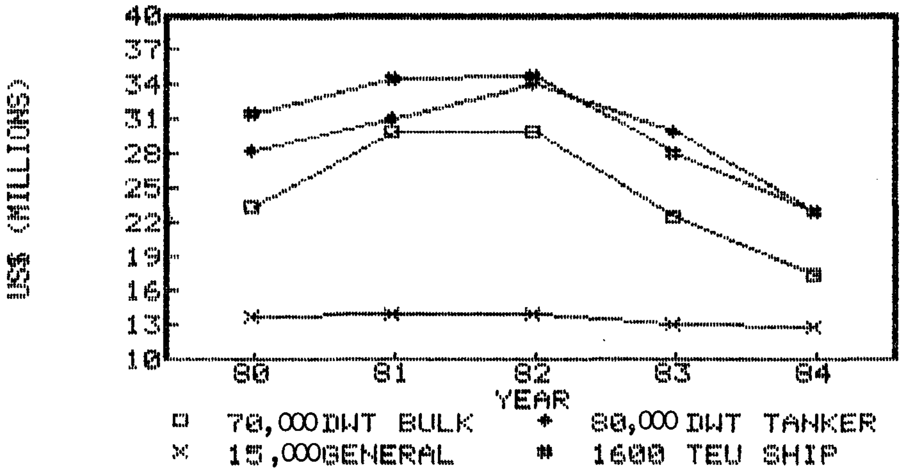
A. Ship prices

22. Shipbuilding prices for representative newbuildings are contained in table 16, while selected vessel newbuilding price trends for the 1980-1984 period are noted in graph 18. The 1984 recorded prices for almost all types and sizes declined from 1983 and marked a continuation of lower price trends since the peak years of 1981/1982. In 1984 large ro/ro vessels and bulk carriers experienced the sharpest drop while LNG and general cargo vessel prices remained about the same as for 1983.

Graph 18

Newbuilding prices[11/] for selected vessel types and sizes, 1980-1984

(millions of dollars)



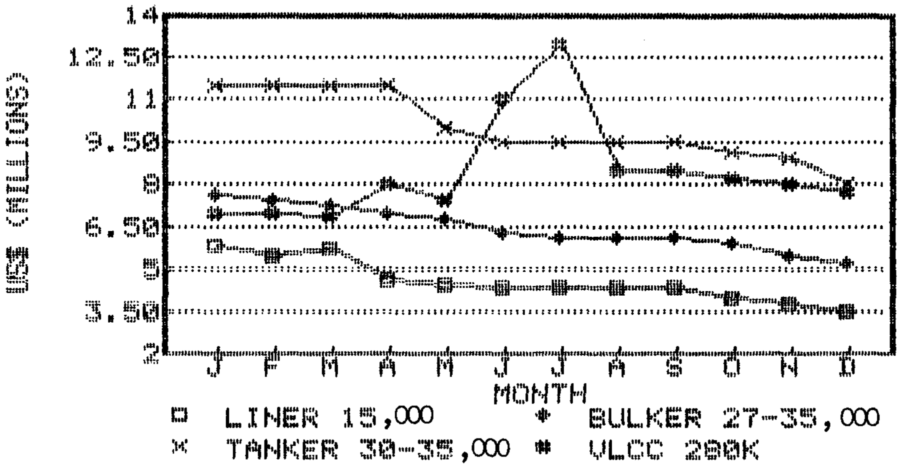
23. Second-hand prices in 1984 slightly declined, except for a mid-year peak for VLCCs. The explanation for these price trends (see graph 19) may be found in relatively stable freight market conditions (see table 21), which provided little incentive for shipowners to increase their purchases of second-hand vessels. Demolition prices, however, increased during the January-December 1984 period, particularly in southern Europe, as steel production expanded in EEC countries (see graph 20).

11/ Lloyd's Shipping Economist (London), various issues.

Graph 19

Second-hand prices for selected five-year-old ships 12/, 1984

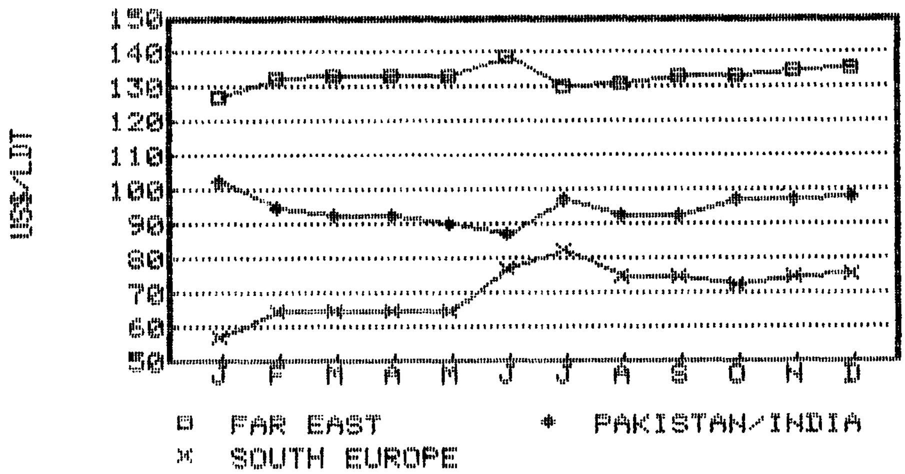
(millions of dollars)



Graph 20

Scrap prices, 1984 13/

(dollars per LDT)



12/ Eggar Forrester, Shipping Commentary, December 1984.

13/ Institute of Shipping Economics, Bremen, Shipping Statistics, December 1984.

Table 16

Representative newbuilding prices, 1980 and 1982-1984.
(Millions of dollars)

Type and size of vessel	1980	1982	1983	1984
30 000 dwt bulk	16.7	19.2	15.0	14.0
32 000 dwt tanker	18.7	27.7	24.0	18.0
70 000 dwt bulk	23.6	29.9	22.5	17.5
80 000 dwt tanker	28.3	34.1	30.0	23.0
120 000 dwt bulk	32.2	41.3	32.0	27.5
250 000 dwt tanker	75.0	75.0	73.0	60.0
125 000 m3 LNG	200.0	249.1	200.0	200.0
75 000 m3 LPG	77.0	70.0	55.0	50.0
1 200 TEU ro/ro	43.7	43.7	40.0	28.0
15 000 dwt general cargo ship	13.9	14.0	13.0	12.8
1 600 TEU full containership	31.5	34.7	28.0	23.0

Source: *Lloyd's Shipping Economist* (London), various issues.

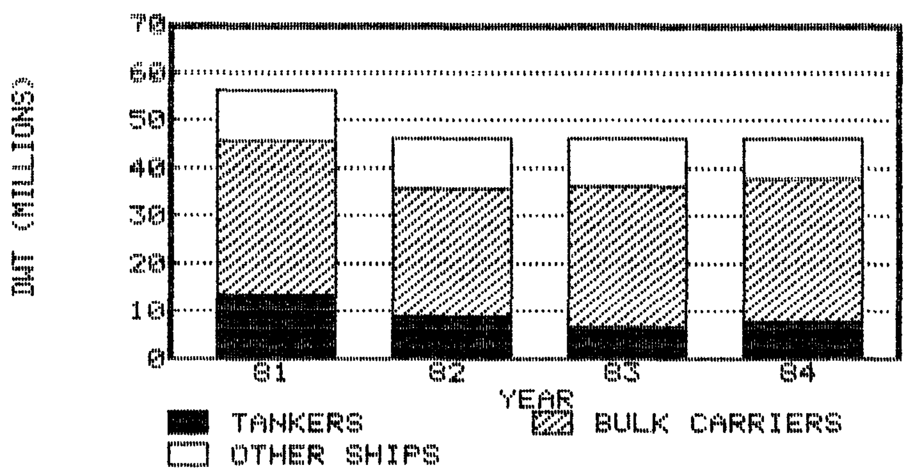
B. Tonnage on order

24. Trends during the 1982-1984 period and the third quarter 1984 status of world tonnage on order are summarized in tables 17 and 18. World tonnage on order as at September 1984 (46.6 million dwt) stood at about the same level as in September 1982. Indeed, in spite of the continuing situation of overtonnaging in practically all sectors, there has not been any drastic decline in tonnage on order during the 1982-1984 period (see graph 21). However, a certain shift in the mix of shipbuilding orders from tankers to dry bulk carriers is noticed. The continuation of relatively high levels of ordering - in the face of a situation of continuing oversupply of tonnage - may be explained partly by the expectation of shipowners that world production and trade will improve and thus create additional transport demand (particularly in the dry bulk sector). In addition newbuilding prices have decreased, while many Governments continue to support their shipbuilding industry with subsidy programmes, and thus the net result of all of the above has been to encourage new shipbuilding orders. As at year-end 1984, a total of 29.46 million dwt was due for delivery in 1985 while very little tonnage was scheduled for later delivery.

Graph 21

Distribution of newbuilding orders by principal vessel types at third quarter, 1981-1984

(dwt millions)

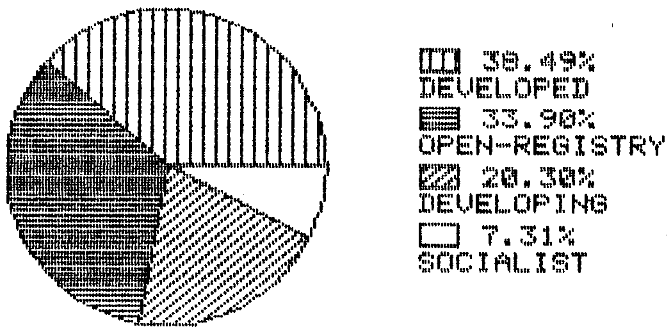


25. The distribution of newbuilding orders among country groups (see table 18 and graph 22) indicates that the combined total of developed market-economy countries and open-registry countries represents 72.4 per cent of the total deadweight on order as at 30 September 1984. By comparison developing countries and socialist countries accounted for 20.3 per cent and 7.3 per cent, respectively.

Graph 22

Tonnage on order by country groups, 30 September 1984

(percentage distribution based on dwt)



C. Deliveries of newbuildings

26. Trends in newbuilding deliveries are presented in table 19. For the 1982-1984 period total deadweight and number of vessels delivered by shipyards declined 4.5 per cent and 8.2 per cent respectively. By vessel type, tankers experienced a 36.9 per cent decline in deadweight deliveries, while general cargo ships increased deadweight by 36.5 per cent for the same three-year period (1982-1984).

27. The country grouping's share of newbuilding grt deliveries are shown in table 20 (figures based on January to September deliveries). In 1984 the share of developed market-economy countries dropped to 77.0 per cent, as compared to 83.0 per cent in 1983 and 78.6 per cent in 1982. On the other hand, the share of developing countries in 1984 was 9.7 per cent (as compared to 7.8 per cent in 1983 and 12.1 per cent in 1982) while that of socialist countries of Eastern Europe and Asia was 8.4 per cent in 1984 (7.0 per cent in 1983 and 7.5 per cent in 1982).

Table 17

World tonnage on order at the end of each quarter, 1982, 1983 and 1984
(Millions of dwt and percentage change)

Tonnage on order as at	All ships in millions of dwt	Percen-tage change	Tankers in millions of dwt	Percen-tage change	Bulk carriers (inc.combined carriers) in millions dwt	Percen-tage change	Other ships in millions of dwt	Percen-tage change
31 March 1982	52.1		10.9		31.4		9.9	
30 June 1982	49.7	-4.6	10.4	-4.6	29.2	-6.9	10.1	+2.7
30 September 1982	46.2	-7.1	9.2	-11.2	26.7	-8.7	10.3	+1.9
31 December 1982	43.5	-5.9	7.9	-14.6	25.4	-4.9	10.2	-0.9
31 March 1983	38.7	-10.9	7.3	-7.0	21.5	-15.1	9.9	-3.4
30 June 1983	43.3	+11.8	6.7	-8.6	27.1	+25.7	9.6	-3.4
30 September 1983	46.3	+6.8	7.2	+8.2	29.3	+8.5	9.7	+1.3
31 December 1983	47.9	+3.5	8.3	+14.9	29.8	+1.6	9.8	+0.9
31 March 1984	47.0	-1.8	7.8	-5.8	30.1	+0.9	9.1	-6.7
30 June 1984	46.6	-1.0	8.0	+1.5	30.2	+0.3	8.5	-7.0
30 September 1984	46.6	-	8.2	+3.4	29.8	-1.2	8.6	+0.9

Source : Shipping Information Services of Lloyd's Register of Shipping and Lloyd's of London Press Limited.

Table 18

World tonnage on order as at 30 September 1984
(Thousands of dwt)

Countries of registry	All ships	Tankers 150 000 dwt and over	Tankers under 150 000 dwt	Ore/oil and OBO carriers	Other bulk carriers	Full container ships	Part container ships	Ro/ro cargo ships	Other ships
World total	46 589	421	7 808	2 810	26 994	2 801	71	779	4 905
Developed market-economy countries	17 605	257	3 155	439	9 295	1 232	71	424	2 732
Open-registry countries	15 507	-	2 109	1 861	10 189	323	-	17	1 008
Sub-total	33 112	257	5 264	2 300	19 484	1 555	71	441	3 740
Socialist countries, total	3 343	164	326	100	1 407	497	-	302	547
Of which:									
in Eastern Europe	1 953	164	197	100	785	164	-	302	241
in Asia	1 390	-	129	-	622	333	-	-	306
Developing countries, total a/	9 287	-	2 218	411	5 667	345	-	35	611
Of which:									
in Africa	465	-	-	-	358	-	-	26	82
in America	2 148	-	512	-	1 363	89	-	9	175
in Asia	6 673	-	1 706	411	3 946	256	-	-	354
in Oceania	1	-	-	-	-	-	-	-	1
Other unallocated	847	-	-	-	437	404	-	-	7

Source : Shipping Information Services of Lloyd's Register of Shipping and Lloyd's of London Press Ltd.

a/ Developing countries in Europe had no tonnage on order.

Note: Owing to rounding, the totals do not always add up.

Table 19

Deliveries of newbuildings, 1982-1984 a/
(Number of ships and thousands of grt/dwt)

Type of ship		1982	1983	1984
Tankers	Number	146	136	100
	Grt	2 301	2 656	1 406
	Dwt	3 903	4 700	2 464
Bulk/oil carriers	Number	14	14	6
	Grt	594	590	105
	Dwt	1 112	1 070	172
Ore and bulk carriers	Number	219	190	275
	Grt	6 318	5 068	6 587
	Dwt	11 548	8 817	11 131
General cargo ships b/	Number	178	189	228
	Grt	906	1 151	1 480
	Dwt	1 415	1 613	1 931
Other ships	Number	1 080	1 128	955
	Grt	2 409	3 144	3 507
	Dwt	2 891	3 264	3 452
Total	Number	1 637	1 657	1 564
	Grt	12 527	12 609	13 085
	Dwt	20 870	19 464	19 150

Source : Information provided by the Shipping Information Services of Lloyd's Register of Shipping and Lloyd's of London Press Ltd.

a/ The figures in this table refer to the period January - September for each year.

b/ Vessels of 2,000 grt and over.

Table 20

Distribution of deliveries of newbuildings by groups of countries of build, 1982-1984 a/ (Thousands of grt) b/

Country grouping	1982	1983	1984
Developed market-economy countries	9 898 (78.6)	10 443 (83.0)	10 012 (77.0)
Developing countries	1 519 (12.1)	975 (7.8)	1 263 (9.7)
Socialist countries	942 (7.5)	881 (7.0)	1 086 (8.4)
Other, unallocated	228 (1.8)	282 (2.2)	632 (4.9)
World total (100.0)	12 587	12 581	12 993

Source : Compiled by the UNCTAD secretariat on the basis of data contained in Lloyd's Register of Shipping : Merchant shipbuilding returns, quarterly issues of the respective years.

a/ As for table 19, this table is based on the period January to September. However the total tonnages are not exactly the same as in table 19 because of possibly incomplete figures given in the quarterly returns.

b/ The percentage shares of the world total are indicated in brackets.

Chapter V

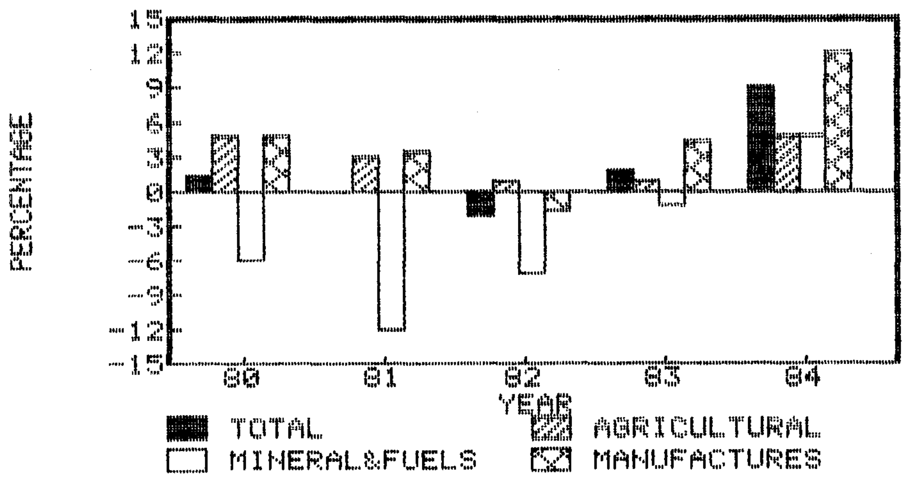
FREIGHT MARKETS

A. Freight rates of main cargo sectors

28. Comparative freight trend indicators for the 1982-84 period for major market sectors are presented in table 21. The annual average shows an increasing trend for all indices except handy size dirty tankers with the largest increases between 1982 and 1984 shown for VLCC/ULCC tankers (plus 34.6 per cent) liner freight rates (plus 26.8 per cent) and dry cargo tramp time charter (plus 19.4 per cent). This upturn in average freight rate levels would appear to have been influenced by a 6.7 per cent increase in the volume of world seaborne trade. As indicated in chapter I, this results (among other factors) from expanded steel manufacturing and the derived shipping demand for steel raw materials (iron ore ton-miles up 14.4 per cent over 1983), a marginal expansion of grain ton-miles (up 1.3 per cent over 1983), and a significant increase in coking and thermal coal seaborne trade (an increase of 13.5 per cent over 1983).

Graph 23

Average annual percentage change in world export volumes, 1980-1984



Source: GATT, International trade in 1984 and current prospects, March 1985.

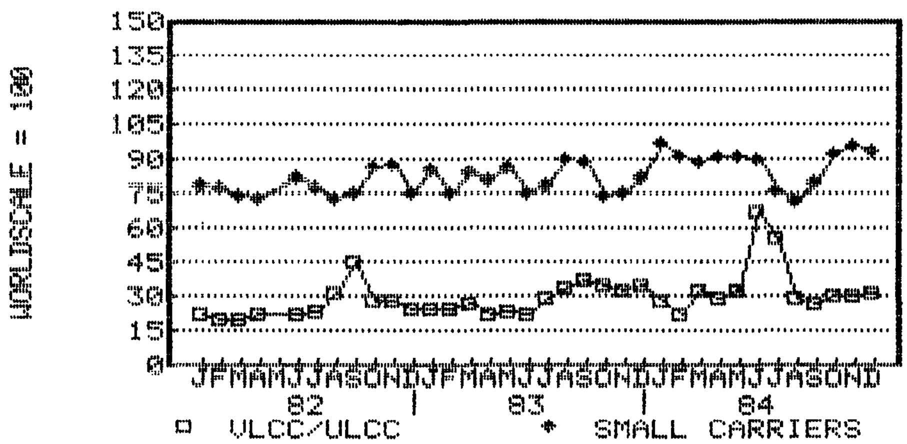
29. The supply side of the freight market, however, counterbalanced the increase in the demand for shipping services and thus the primary reason for a rather static 1984 freight market is the substantial over-tonnaging found in most sectors of the shipping industry.

30. Turning to individual market sectors, 1984 tanker freight rates were generally higher than in the two previous years, but are still depressed with worldscale rates at about the break-even point. However, war risk insurance premiums increased for vessels trading from Iranian ports which resulted in a price differential for tankers loading within Gulf ports. Freight rates for shorter-haul tanker trades, e g, West Africa and North Africa to Europe, and Caribbean to the United States, reflected particular seasonal fluctuations although monthly changes during 1984 were not very pronounced. For example, worldscale spot rates for a 30,000 dwt carrier from the Caribbean to United States East Coast were reported to be 150 in January 1984 and 140 by year-end,[14/] while worldscale rates from the Mediterranean to North-West Europe (17-30,000 dwt) were 3.6 per cent higher in November than in January 1984.[15/] In the smaller tanker freight market, the indices for small crude and product carriers also remained at about the same level over the 12-month 1984 period, e.g. down 4.1 per cent from January to December, but the average annual index was marginally higher (89) for 1984 than for 1982 and 1983, with average annual indices of 78 and 82, respectively.[16/]

Graph 24

Freight indices for VLCC and small tankers, 1982-1984

(Worldscale)



14/ Fearnleys Review 1984, page 35.

15/ Drewry Shipping Consultants, Shipping Statistics and Economics, January 1985, page 9.

16/ Table 21.

Table 21

Freight rate indices, 1982 - 1984
(Monthly or quarterly figures)

Freight rate indices	Liner freight rates a/ (1965 = 100)			Dry cargo tramp time charter b/ (1976 = 100)			Dry cargo tramp trip charter c/ (July 1965 to June 1966=100)			Tanker freight indices c/														
										VLCC/ULCC			Medium-size crude carriers			Small crude and product carriers			Handy size dirty			Handy size clean		
Period	1982	1983	1984	1982	1983	1984	1982	1983	1984	1982	1983	1984	1982	1983	1984	1982	1983	1984	1982	1983	1984	1982	1983	1984
January	322	319	340				165	155	173	22	25	28	51	52	58	79	86	98	140	134	135	133	119	125
February	321	319	341	117	94	117	166	163	173	20	25	23	45	48	64	78	75	92	129	119	141	125	121	145
March	321	320	360				169	167	173	20	27	33	46	48	62	74	85	89	129	126	135	134	114	135
April	322	319	367				177	168	182	22	22	29	47	48	56	73	81	92	123	133	134	135	114	130
May	321	319	369	129	106	128	173	178	178	24	24	33	50	53	56	82	87	92	135	119	121	136	110	133
June	323	319	370				159	177	168	23	23	68	50	50	61	78	75	91	130	110	116	129	106	132
July	322	319	441				147	180	166	24	29	56	52	58	53	74	79	77	127	116	118	123	114	124
August	322	318	444	84	100	114	145	173	167	32	34	29	48	64	49	73	90	72	117	122	111	119	120	109
September	320	316	460				150	167	167	46	38	27	49	61	53	76	89	80	134	131	121	125	115	125
October	319	318	466				151	167	171	28	35	30	53	53	55	87	74	93	122	125	123	122	115	136
November	318	324	457	84	103	134	153	176	178	28	33	31	52	52	58	88	76	96	134	116	129	99	121	121
December	318	324	473				152	173	175	25	35	32	50	53	56	75	83	94	134	132	124	124	127	119
Annual average	321	319	407	103	101	123	159	170	173	26	29	35	49	53	57	78	82	89	129	123	126	125	116	128

Note : All indices have been rounded to the nearest whole number.

a/ Liner index compiled by the Ministry of Transport of the Federal Republic of Germany. Monthly weighted assessments of freight rates on cargoes loaded or discharged by liners of all flags at ports in the Antwerp/Hamburg range.

b/ Compiled and published on a quarterly basis by the General Council of British Shipping.

c/ Compiled and published by Norwegian Shipping News (Oslo). Worldscale = 100, as effective in each year. For tankers, vessel size groups are as follows : VLCC/ULCC 150,000 dwt upwards, medium-sized crude carriers 60-150,000 dwt, small crude and product carriers 30-60,000 dwt and handy-sized clean and dirty tankers below 30,000 dwt.

31. In 1984, dry bulk trades voyage and trip charter rates for the major bulk commodities experienced a mid-year surge but by December representative freights were about the same as in January. For example, in the international iron ore trades in which 1984 exports reached 299 million tons,[17/] freight rates for Brazil to Europe in 80,000-100,000 dwt vessels were about $5.25/ton[18/] in January 1984 and were almost the same in late October. Grain shipments followed a similar 1984 pattern as rates from the US Gulf to North-West Europe in 50-60,000 dwt vessels started the year at about $9.00/ton, peaked in May at $11.00/ton and ended the year at $9.00/ton.[19/] Representative coal cargo rates also showed relatively little change, with the percentage difference between January 1984 and December 1984 down only 8.0 per cent for Panamax-size shipments on the Hampton Roads/Japan route.[20/]

32. Selected 1984 freight rates for other dry bulk commodities that are of particular interest to developing countries are summarized below:

Commodity	Route	Freight rate range $US/ton	
		High	Low
Grain	United States (Gulf of Mexico)/Venezuela ..	17.00	9.50
Grain	United States (Gulf of Mexico)/China	29.00	23.56
Iron ore	Monrovia/North-West Europe	6.25	4.40
Sugar	Mauritius/United Kingdom	11.58	15.73
Fertilizers	Aqaba/West Coast India	15.00	11.25
Fertilizers	United States (Gulf Coast)/West Coast India	37.00	30.00

Source: Lloyd's List, various issues.

33. The time charter rates in the dry bulk sector reached a three-year high in 1984. The annual average index was 19.4 per cent above the 1982 index and 21.8 per cent higher than the average annual index in 1983.[21/] By vessel size, 12-month period fixtures for 100,000 dwt vessels peaked in May 1984 with rates reaching $2.55/dwt/month. December rates, however, declined to $2.05/dwt/month, but this was still 10.8 per cent higher than the January 1984 rate. By comparison medium size (50,000 dwt) vessels sustained a rate increase to $3.55/dwt/month for the last quarter of 1984, while handy size (20-40,000 dwt) dry bulkers started and ended the year at the same rates, i e, $4.75/dwt/month.[22/]

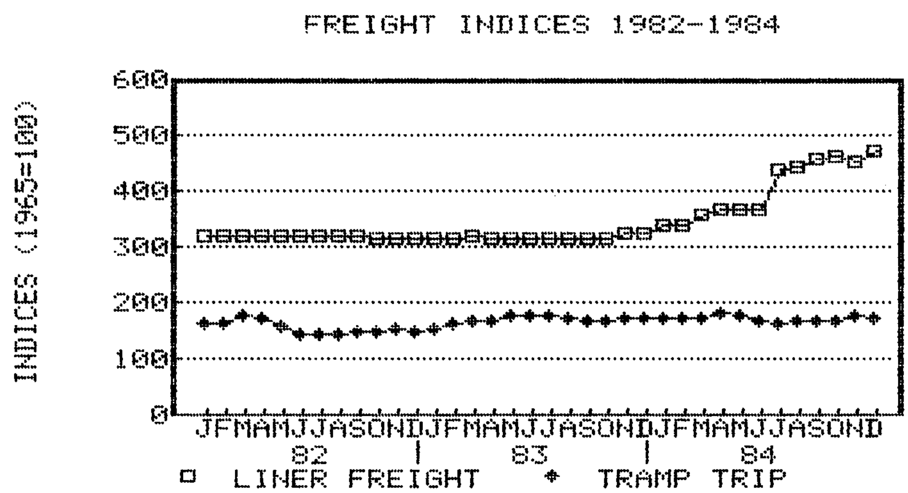
17/ Fearnleys Review 1984, page 29.
18/ Drewry Shipping Consultants, Shipping Statistics and Economics, January 1985, page 30.
19/ Eggar Forrester, Shipping Commentary, January 1985.
20/ Ibid.
21/ See table 21.
22/ Fearnleys Review 1984, page 36.

34. The number of reported time charters during 1984 increased by 80 per cent over 1983 and represented 176 vessels for a total of 13.3 million dwt. Larger bulk carriers, which were particularly affected by the recent expansion of iron ore and coal trades, predominated in these reported open-market contracts with Panamax-size ships and larger bulkers representing 37.6 per cent and 52.6 per cent, respectively, of the known fixtures.[23/]

35. For the liner trade sector, the index (see table 21) compiled by the Ministry of Transport for the Federal Republic of Germany is a representative indicator for trades with that country. This index, however, is rather narrowly based and greatly influenced by declining currency exchange ratios of the Deutschmark versus the United States dollar. During 1984 the liner index increased by 39.1 per cent over the January to December period and was 27.6 per cent higher than the 1983 annual average. The monthly movements of this liner index as well as of the dry cargo tramp trip charter index between 1982 and 1984 are shown in graph 25.

Graph 25

Freight indices for liner and tramp vessels, 1982-1984



23/ Drewry Shipping Consultants, Shipping Statistics and Economics, January 1985, page 37.

36. A more general indication of liner conference freight trends are the number and percentage changes announced by liner conferences. Based upon 1984 data monitored[24/] by the UNCTAD secretariat, three conferences announced general increases in tariffs at the level of 8 per cent. However, these data cover only general rate changes. Information on special liner rates for individual commodities, which may be more important, is lacking. Also recorded were 33 increases in CAFs and eight increases in BAFs and, on the other hand, decreases in 74 CAFs and five BAFs. These surcharges ranged from +25.70 per cent to -38.16 per cent.

B. Liner freight rates as a percentage of prices of selected commodities

37. Most of the non-bulk exports and imports of developing countries are carried by liner services and liner freight rates may thus have a significant effect on the balance of payments, national income and market competitiveness. Table 22 provides information on liner freight rates as a percentage of c.i.f. prices for selected commodities and routes for 1970 and 1980 to 1983. Except for coffee, all 1983 ratios declined as compared to 1982. The greatest decreases in the 1984 ratio of freight rates to c.i.f. prices were for palm kernels (Nigeria-Europe), which dropped to 22.6 per cent from 31.7 per cent in 1983; and for coconut oil (Sri Lanka-Europe), which decreased to 11.0 per cent from 17.3 per cent in 1983. The decrease in the freight rate proportions, which occurred despite a small increase in freight rates, can be traced to the improvement of prices for the selected commodities in 1983.[25/]

24/ With respect to nine conferences serving developing countries.

25/ During 1983 prices for primary products (food, agricultural raw materials and non-ferrous metals but excluding crude petroleum) taken as a whole increased 5.5 per cent over 1982. GATT, International trade in 1984 and current prospects, March 1985.

C. Estimates of global freight costs

38. Table 23 gives an estimate of total freight costs in world trade and the ratio of ocean freight to the total c.i.f. value of imports by groups of countries. In 1983 the world total of freight costs was estimated at $111.2 billion, which is 9.8 per cent less than 1980. Globally, freight costs as a percentage of import value remained at about 6.6 per cent over the 1981-1983 period. For developing countries, however, the percentage figure for 1983 continued to be approximately double that of developed market-economy countries, i e, 10.8 per cent as against 5.4 per cent (see graph 26).

Graph 26

Freight as a percentage of import value, 1980-1983

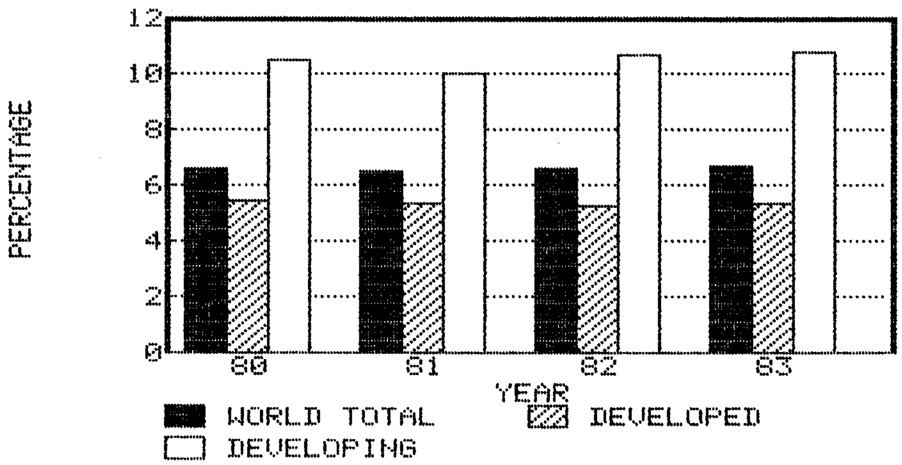


Table 22

Ratio of liner freight rates to prices of selected commodities, 1970 and 1980-1983

Commodity	Route	Freight rate as a percentage of price a/ b/ c/				
		1970	1980	1981	1982	1983
Rubber	Singapore/Malaysia Europe	10.5	8.9	7.3	8.7	5.9
Tin	Singapore/Malaysia Europe	1.2	1.0	1.2	1.2	0.9
Jute	Bangladesh-Europe	12.1	19.8	21.4	21.7	21.4
Sisal hemp	East Africa-Europe	19.5	15.7	15.4	15.3	14.8
Cocoa beans	Ghana-Europe	2.4	2.7	3.0	3.6	2.6
Coconut oil	Sri Lanka-Europe	8.9	12.6	14.4	17.3	11.0
Tea	Sri Lanka-Europe	9.5	9.9	10.2	10.7	8.1
Coffee	Brazil-Europe	5.2	6.0	9.0	7.8	7.4
Palm kernels	Nigeria-Europe	8.8	18.3	27.7	31.7	22.6
Coffee	Colombia (Atlantic ports)-Europe	4.2	3.3	3.8	4.2	4.4
Cocoa beans	Brazil-Europe	7.4	8.6	9.3	11.9	9.7
Coffee	Colombia (Pacific ports)-Europe	4.5	4.4	5.5	5.0	5.2

Source : Compiled by the UNCTAD secretariat on the basis of data supplied by the Royal Netherlands Shipowners' Association.

a/ C.i.f. prices were quoted for rubber (London-RSS), tin, jute (UK-pwc grade), sisal hemp, cocoa beans (Ghana-Europe) and palm kernels. For cocoa beans (Brazil-Europe) and coffee (Colombia-Europe and Brazil-Europe), unit values of exports were quoted. Prices of the remaining commodities are quoted on f.o.b. terms.

b/ Freight rates include, where applicable, Suez Canal surcharges, bunker and currency adjustment factors, a "tank cleaning surcharge" (for coconut oil only), port delay and additional port surcharges and a low productivity surcharge (for Colombia only). Conversion of rates to other currencies is based on parities given in International Financial Statistics published by the International Monetary Fund. Annual freight rates were calculated by taking a weighted average of various freight rates quoted during the year, weighted by their period of duration.

c/ For the period 1980-1983, the prices of coconut oil and sisal hemp were taken from UNCTAD, Monthly Commodity Price Bulletin, in the December issue of the respective following year.

Table 23

Estimate of total freight costs in world trade a/ by groups of countries, 1980, 1982 and 1983

(totals and percentages of import values)

Year	Country group	Estimate of total freight costs of imports (millions of dollars)	Value of imports (c.i.f.) (millions of dollars)	Freight costs as a percentage of import value
1980	1. World total	123,264	1,856,834	6.64
	2. Developed market-economy countries	79,514	1,441,080	5.52
	3. Developing countries - total	43,750	415,754	10.52
	Of which:			
	in Africa	10,432	77,757	13.42
	in America	10,929	123,495	8.85
	in Asia	21,979	211,089	10.41
	in Europe	92	936	9.83
	in Oceania	318	2,477	12.84
1982	1. World total	113,803	1,710,542	6.65
	2. Developed market-economy countries	68,465	1,286,550	5.32
	3. Developing countries - total	45,338	423,992	10.69
	Of which:			
	in Africa	8,139	75,198	10.82
	in America	9,503	101,108	9.40
	in Asia	27,301	244,429	11.17
	in Europe	77	783	9.85
	in Oceania	318	2,474	12.85
1983	1. World total	111,237	1,666,959	6.67
	2. Developed market-economy countries	67,866	1,264,250	5.37
	3. Developing countries - total	43,371	402,709	10.77
	Of which:			
	in Africa	7,330	68,803	10.65
	in America	8,246	81,790	10.08
	in Asia	27,429	249,095	11.01
	in Europe	72	733	9.82
	in Oceania	294	2,288	12.84

Source: Derived from IMF f.o.b./c.i.f. factors and IMF import data.

a/ The estimate for the world is not complete since data for countries that are not members of IMF are not included.

D. Freight market futures

39. Discussions took place in the latter part of 1984 between two new futures exchanges dealing in ocean freight contracts. The two organizations, Baltic International Freight Futures Exchange (BIFFEX) and Future Exchange Bermuda (INTEX), are planning to offer shippers a uniform freight rate contract that would be tied to an index of dry bulk cargo rates for several commodities over worldwide trading routes. The contracts would enable buyers to hedge against freight rate increases but would equally have the disadvantage of denying savings if freight rates declined. It is not clear to what extent these developments may lead to greater stability in freight rates in the future.

Chapter VI

OTHER DEVELOPMENTS

A. Code of Conduct for Liner Conferences

40. During 1984 no countries became Contracting Parties to the Convention, which entered into force on 6 October 1983. Thus the total number of countries remains at 59,[26/] accounting for 28.68 per cent of relevant world tonnage. The UNCTAD secretariat has continued to give assistance, on request, to countries wishing to implement the Code.

41. Despite this large number of Contracting Parties, the Code is at present only applied in a rather limited number of trade routes. This is partly due to the fact that certain important trading countries have not yet become Contracting Parties to the Convention, as well as to the delays experienced in passing implementing legislation or regulations in countries that are already Parties to the Code.

42. However, a number of countries members of OECD have declared their intention of ratifying or acceding to the Convention in the near future, which will considerably increase its geographical scope of application. It is only after this more global acceptance of the Convention that the Code can be expected to play its anticipated role as a new, commonly-accepted, regulatory framework for liner conferences.

43. Only a limited number of countries Contracting Parties to the Convention have so far enacted legislation or taken other measures necessary to implement the Code pursuant to article 47(I) of the Convention. Consequently, the Committee on Shipping at its eleventh session adopted decision 50(XI) urging States which are Contracting Parties to the Convention to take the necessary measures to implement it in a harmonized manner and in conformity with its scope and provisions.

26/ Bangladesh; Barbados; Benin; Bulgaria; Cape Verde; Central African Republic; Cameroon; Chile; China; Congo; Costa Rica; Cuba; Czechoslovakia; Egypt, Ethiopia; Gabon; Gambia; German Democratic Republic; Germany, Federal Republic of; Ghana; Guatemala; Guinea; Guyana; Honduras; India; Indonesia; Iraq; Ivory Coast; Jamaica; Jordan; Kenya; Lebanon; Madagascar; Malaysia; Mali; Mauritius; Mexico; Morocco; Netherlands; Niger; Nigeria; Pakistan; Peru; Philippines; Republic of Korea; Romania; Senegal; Sierra Leone; Sri Lanka; Sudan; Togo; Tunisia; Union of Soviet Socialist Republics; United Republic of Tanzania; Trinidad and Tobago; Uruguay; Venezuela; Yugoslavia; Zaïre.

44. Pursuant to the same decision, the UNCTAD secretariat is undertaking a comprehensive study on the implementation of the Convention for submission to the Committee at its twelfth session. This report is being prepared bearing in mind the requirement to hold a review conference in late 1988 pursuant to article 52 of the Convention.

B. United Nations Convention on International Multimodal Transport of Goods

45. The United Nations Convention on International Multimodal Transport of Goods [27/] which was adopted by consensus on 24 May 1980 by the United Nations Conference of Plenipotentiaries, was opened for signature in New York from 1 September 1980 to 31 August 1981 and has remained open for accession thereafter. It will enter into force 12 months after 30 States have become Contracting Parties by definitive signature, ratification or accession. By January 1985 four countries, namely Chile, Malawi, Mexico and Senegal, had ratified or acceded to the Convention, while three countries - Morocco, Norway and Venezuela - had signed the Convention subject to ratification.

C. Multimodal transport - general developments

46. Multimodal transport is becoming increasingly important throughout the world and the need for streamlining of the cargo chain is becoming obvious to Governments and industry alike. The need for a universally accepted multimodal transport document is being recognized and UNCTAD, together with ECE and FALPRO, has drafted the front page of such a document using a standard United Nations layout. The drafting of the clauses of such a document is now being undertaken by UNCTAD and will be submitted for consideration to the Committee on Shipping at its twelfth session.

47. Another development is the establishment of inland container depots (ICDs) in littoral and land-locked developing countries. For example ICDs have been set up in Kenya, Uganda, Malawi and India. The introduction of unit trains to service these ICDs has been a further step in the streamlining of the cargo chain.

27/ For the text of the Convention, see United Nations Conference on a Convention on International Multimodal Transport, vol. I, Final Act and Convention on International Multimodal Transport of Goods (United Nations publication, Sales No E.81.II.D.7(vol. I)).

48. To assist with the introduction of multimodal transport UNCTAD has developed a workshop where senior officials can learn of the advantages and pitfalls of multimodal transport and of how to improve the climate for the introduction of multimodal transport in their country. The 1984 workshop has been held twice in Africa and Asia and will be held again in Africa, in French, during 1985. The workshop papers are available in English, French and Spanish.

D. Marine insurance, maritime fraud, and maritime liens and mortgages

49. The subgroup of experts that had been established at the seventh session of the Working Group on International Shipping Legislation finalized its work on drawing up a set of standard non-mandatory international model clauses concerning hull and marine cargo insurance at the tenth session of the Working Group held in Geneva from 24 September to 5 October 1984. This included, *inter alia*, model text dealing with a set of clauses on the application of the insurance in time and place, on measures of indemnity and on who could claim under the policy.

50. The subject of maritime liens and mortgages was also reviewed by the Working Group on International Shipping Legislation at its tenth session.[28/] The subgroup dealing with this item held preliminary discussions and recommended that an in-depth study be made on economic aspects of maritime liens and mortgages, and that the International Convention for the Unification of Certain Rules Relating to Maritime Liens and Mortgages of 1967 be taken as the basis for future work and discussion.

51. Pursuant to resolution 49(X) adopted by the Committee on Shipping at its tenth session, the *Ad Hoc* Intergovernmental Group to consider Means of Combating all Aspects of Maritime Fraud, including Piracy, held its first session in Geneva from 6 to 17 February 1984. At the end of its session, the *Ad Hoc* Intergovernmental Group adopted resolution 1(I) which recommended that a second session of the Group be held and which also requested the UNCTAD secretariat to prepare in-depth studies on various subjects relating to maritime fraud. These could include, *inter alia*, the feasibility of improving co-operation between State administrative and prosecuting authorities, a super-service banking scheme, minimal professional qualifications for shipping agents and the availability and adequacy of shipping information needed to combat maritime fraud.

28/ Pursuant to resolution 49(X) of the Committee on Shipping.

E. United Nations Conference on Conditions for Registration of Ships

52. The United Nations Conference on Conditions for Registration of Ships held the first part of its session in Geneva from 16 July to 3 August 1984. The Conference was covened pursuant to General Assembly resolution 37/209 of 20 December 1982 to consider the adoption of an international agreement covering the conditions under which vessels should be accepted on national shipping registers. The Conference reconvened from 28 January to 15 February 1985 and during that period progress was made on the composite text, which contains draft texts for an international agreement. A further two-week meeting was recommended to be held in July 1985.

F. UNCTAD Committee on Shipping

53. The Committee on Shipping, which is the main international forum for resolving policy issues relating, *inter alia*, to participation in world shipping by developing countries, held its eleventh session in Geneva from 19 to 30 November 1984. At the conclusion of the two-week Conference four decisions and three resolutions were unanimously adopted. The scope of these decisions and resolutions included directives to the UNCTAD secretariat to: (1) provide guidance to Governments in the implementation of the Convention on a Code of Conduct for Liner Conferences; (2) convene a meeting of an *ad hoc* intergovernmental group of senior officials early in 1986 to consider a programme of action for co-operation among developing countries in the areas of shipping, ports and multimodal transport; (3) maintain its technical assistance and training services; (4) prepare in-depth reports dealing with the structural imbalance in the world shipping industry and another study focusing on the effects of round-the-world liner services; and (5) convene a group of experts to develop and recommend model rules for multimodal container tariffs. The Committee on Shipping also endorsed the agreement between UNCTAD and IMO on the method of work to be followed in the two organizations with regard to the subjects of maritime liens and mortgages, and approved the inclusion of these subjects on the agenda of the eleventh session of the UNCTAD Working Group on International Shipping Legislation.

G. UNCTAD technical assistance in shipping and ports[29/]

54. During 1984 the UNCTAD secretariat executed a total of 44 technical assistance projects financed by UNDP, recipient countries and funds-in-trust (as against 36 in 1983). These projects were basically concerned with the provision of advisors and consultants, training (fellowships and group training), and, to a lesser degree, equipment procurement. Twelve projects (10 in 1983) were initiated and ten (six in 1983) were completed. These were 67 experts engaged in the projects (43 in 1983) and 1,500 fellows/course participants were trained (970 in 1983). The total project budget during the year was $US2.0 million ($US2.5 million in 1983). In addition, two shipping feasibility studies were completed for developing countries during 1984.[30/]

55. Under a project entitled "Improving Port Performance (IPP)", which is generously financed by the Swedish International Development Authority, the UNCTAD secretariat completed in 1984 the development of materials for a middle management course entitled "Management of General Cargo Operations". This course has been designed for delivery by local instructors to train traffic officers and quay-shed superintendents to become better equipped to plan and organize cargo handling operations in ports, making the most efficient use of the resources available. Course materials are obtainable in English, French, Spanish, Arabic, Chinese and Portuguese.

56. During 1984 the TRAINMAR programme expanded its role in the field of maritime training. These activities included the establishment of five new training centres, the development of eight new courses, the facilitation of an interexchange of pedagogical materials and the delivery of 80 courses during 1984. Since its inception, TRAINMAR has established 16 training centres, developed 18 maritime courses (nine in ports, four in shipping, two in multimodal transport, three in training of technology), trained 200 trainers and delivered 160 courses for 2,500 managers from developing countries.

29/: For further details, see the report by the UNCTAD secretariat "The UNCTAD programme of technical assistance and training in shipping, ports and multimodal transport" (TD/B/C.4/262).

30/ Funded from the UNCTAD regular budget, as mandated by Conference resolution 121(V).

H. Round-the-world services

57. During the last quarter of 1984 two liner companies introduced a round-the-world service. Utilizing large, full containerships (2,700 and 4,200 TEU capacity), both United States Line and Evergreen offer a weekly frequency with Evergreen providing service in both directions (West to East and East to West), while the American-flag company operates a one-way eastbound schedule. Several other liner companies appear to be planning to introduce similar services.

58. Although it is premature to evaluate the full economic consequences of these new services and others, it is evident that considerable new container capacity (a 40 per cent increase by 1986)[31/] will be added to the world container fleet and that existing conference freight rates will face a more aggressive pricing policy. Furthermore, there will be an expansion of feeder services to regions/ports not directly serviced by the mainline containerships. In order to assist the Committee on Shipping in its evaluation of the impact of these new services, the UNCTAD secretariat has been requested to prepare a report on recent major developments in the pattern of container shipping services on a global scale that may have implications for merchant fleets and ports, especially those of developing countries, and for liner conferences. [32/]

31/ *Container Insight*, September 1984.

32/ Resolution 51(XI) of the Committee.

ANNEXES

Annex I

CLASSIFICATION OF COUNTRIES AND TERRITORIES

Code 1 -	Canada	United States of America
Code 2 -	Japan	
Code 3 -	Australia	New Zealand
Code 4 -	Austria (L)	Italy
	Belgium	Monaco
	Denmark	Netherlands
	Faroe Islands	Norway
	Finland	Portugal
	France	Spain
	Germany, Federal Republic of	Sweden
	Gibraltar	Switzerland (L)
	Greece	Turkey
	Iceland	United Kingdom of Great Britain and Northern Ireland
	Ireland	
	Israel	Yugoslavia
Code 5 -	South Africa	
Code 6 -	Albania	Poland
	Bulgaria	Romania
	Czechoslovakia (L)	Union of Soviet Socialist Republics
	German Democratic Republic	
	Hungary (L)	
Code 7 -	China	Viet Nam
	Democratic People's Republic of Korea	
Code 8 - 8.1	Northern Africa	
	Algeria	Morocco
	Egypt	Tunisia
	Libyan Arab Jamahiriya	

8.2 Western Africa

Angola	Ivory Coast
Benin	Liberia
Cameroon	Mali (L)
Cape Verde	Mauritania
Congo	Nigeria
Equatorial Guinea	St Helena
Gabon	Sao Tome and Principe
Gambia	Senegal
Ghana	Sierra Leone
Guinea	Togo
Guinea-Bissau	Zaire

8.3 Eastern Africa

Burundi (L)	Mozambique
Comoros	Reunion
Djibouti	Seychelles
Ethiopia	Somalia
Kenya	Sudan
Madagascar	Uganda (L)
Mauritius	United Republic of Tanzania
	Zambia (L)

Code 9 - 9.1 Caribbean and North America

Anguilla	Grenada
Antigua and Barbuda	Guadeloupe
Bahamas	Haiti
Barbados	Jamaica
Bermuda	Martinique
British Virgin Islands	Montserrat
Cayman Islands	St Pierre and Miquelon
Cuba	Saint Christopher and Nevis
Dominica	Saint Lucia
Dominican Republic	Saint Vincent and the Grenadines
Greenland	Turks and Caicos Islands
	United States Virgin Islands

9.2	Central America	
	Belize	Honduras
	Costa Rica	Mexico
	El Salvador	Nicaragua
	Guatemala	Panama
9.3	South America-Northern seaboard	
	Guyana	Suriname
	French Guiana	Trinidad and Tobago
	Netherlands Antilles	Venezuela
9.4	South America-Western seaboard	
	Chile	Ecuador
	Colombia	Peru
9.5	South America-Eastern seaboard	
	Argentina	Falkland Islands (Malvinas)[a/]
	Bolivia (L)	Paraguay (L)
	Brazil	Uruguay
Code 10-10.1	Western Asia	
	Bahrain	Lebanon
	Cyprus	Oman
	Democratic Yemen	Qatar
	Iran (Islamic Republic of)	Saudi Arabia
	Iraq	Syrian Arab Republic
	Jordan	United Arab Emirates
	Kuwait	Yemen
10.2	Southern and Eastern Asia	
	Bangladesh	Macau
	Bhutan	Malaysia
	Brunei Darussalam	Maldives
	Burma	Pakistan
	Democratic Kampuchea	Philippines
	Hong Kong	Republic of Korea
	India	Singapore
	Indonesia	Sri Lanka
		Thailand

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a/ A dispute exists between the Governments of Argentina and of the United Kingdom of Great Britain and Northern Ireland concerning sovereignty over the Falkland Islands (Malvinas).

Code 11 - Malta

Code 12 - American Samoa, Christmas Island (Australia), Fiji, French Polynesia, Guam, Kiribati, Nauru, New Caledonia, Papua New Guinea, Samoa, Solomon Islands, Tonga, Tuvalu, Vanuatu, Wake Island

Notes

1. This classification is for statistical purposes only and does not imply any judgement regarding the stage of development of any country.

2. Trade statistics are based on data recorded at the ports of loading and unloading. Trade originating in or destined for neighbouring countries is attributed to the country in which the ports are situated; for this reason land-locked countries do not figure in these tabulations. On the other hand statistical tabulations on merchant fleets include data for land-locked countries that possess fleets: these countries are marked "(L)".

3. The groups of countries or territories used for presenting statistics in this Review are made up as follows:

- Developed market-economy countries and territories:
  Codes 1, 2, 3, 4 and 5
- Socialist countries of Eastern Europe and Asia:
  Codes 6 and 7
- Developing countries and territories:
  Codes 8, 9, 10, 11 and 12
  of which:
  - in Africa: Codes 8.1, 8.2 and 8.3
  - in America: Codes 9.1, 9.2, 9.3, 9.4 and 9.5
  - in Asia: Codes 10.1 and 10.2
  - in Europe: Code 11
  - in Oceania: Code 12

In certain tables, where appropriate, five open-registry countries are recorded as a separate group. The composition of this group was revised in 1981. The group comprises Bahamas, Bermuda, Cyprus, Liberia and Panama.

Annex II

Merchant fleets of the world by flag of registration, a/ groups of countries and types of ships, b/ in grt and dwt, as at 1 July 1984
(dwt figures are shown in parentheses)

	Total	Oil tankers	Bulk carriers c/	General cargo d/	Container ships	Others
World total e/	412,770,327 (674,479,737)	147,013,265 (286,110,393)	125,068,100 (222,354,577)	75,193,735 (108,838,715)	16,912,986 (18,036,590)	48,582,241 (39,139,462)
Developed market-economy countries and territories						
Australia	2,172,850 (3,227,001)	611,595 (1,015,939)	983,726 (1,639,057)	252,510 (352,412)	92,063 (94,272)	232,956 (152,321)
Austria	129,186 (215,385)	-	62,808 (109,712)	60,381 (96,673)	5,997 (9,000)	-
Belgium	2,406,714 (3,890,428)	185,880 (349,497)	1,424,114 (2,597,912)	203,762 (300,011)	187,027 (213,370)	405,931 (429,638)
Canada	1,417,840 (1,239,737)	226,190 (349,486)	391,338 (706,811)	38,395 (35,545)	26,664 (26,372)	735,253 (121,523)
Denmark	5,211,262 (7,973,433)	2,407,359 (4,564,123)	446,096 (797,384)	765,289 (1,197,264)	1,008,242 (1,030,357)	584,276 (384,305)
Faeroe Islands	91,436 (67,497)	499 (1,221)	-	17,624 (30,978)	-	73,313 (35,298)
Finland	2,168,471 (3,209,200)	985,614 (1,825,519)	373,367 (586,811)	498,855 (658,952)	3,895 (4,837)	309,470 (133,081)
France	8,945,046 (15,093,205)	4,799,705 (9,478,088)	1,624,715 (2,904,299)	1,000,876 (1,368,670)	637,763 (669,868)	881,987 (672,280)
Federal Republic of Germany	6,242,467 (9,519,256)	1,578,740 (3,098,294)	842,430 (1,429,044)	1,631,985 (2,812,725)	1,472,103 (1,604,198)	716,209 (574,995)
Gibraltar	247,458 (448,930)	129,716 (266,934)	58,618 (92,513)	55,315 (85,2637)	-	3,809 (4,220)
Greece	35,058,593 (62,236,552)	10,895,463 (21,704,585)	16,439,245 (29,666,891)	6,692,919 (10,076,660)	153,286 (223,570)	877,680 (564,846)
Iceland	178,641 (165,927)	1,539 (2,651)	-	65,980 (112,397)	-	111,122 (50,879)
Ireland	221,375 (270,459)	9,034 (15,420)	91,125 (153,542)	37,382 (55,519)	17,700 (23,413)	66,134 (22,565)
Israel	563,189 (677,450)	991 (1,897)	74,197 (120,480)	149,063 (186,377)	328,779 (362,944)	10,159 (5,752)

	Total	Oil tankers	Bulk carriers c/	General cargo d/	Container ships	Others
Italy	9,157,867 (14,938,899)	3,497,677 (6,603,461)	3,389,221 (5,995,880)	877,449 (1,222,859)	248,095 (260,043)	1,145,425 (856,656)
Japan	40,358,479 (64,624,307)	15,212,153 (28,754,171)	13,226,713 (23,039,898)	3,736,017 (6,141,578)	1,860,527 (1,697,144)	6,323,069 (4,991,5167
Monaco	3,268 (4,959)	3,268 (4,959)	-	-	-	-
Netherlands	4,585,991 (6,653,523)	1,142,857 (2,127,312)	782,427 (1,332,556)	1,257,377 (1,967,797)	550,095 (536,373)	853,235 (689,485)
New Zealand	284,850 (305,898)	73,496 (116,670)	-	91,452 (97,246)	48,441 (47,119)	71,461 (44,863)
Norway	17,662,916 (30,604,843)	8,779,679 (17,233,977)	4,965,043 (8,828,520)	993,949 (1,461,799)	53,239 (36,662)	2,871,006 (3,043,885)
Portugal	1,571,007 (2,684,923)	1,023,362 (2,038,498)	132,593 (225,845)	234,100 (311,911)	9,184 (11,896)	171,768 (96,773)
South Africa	712,220 (790,707)	37,597 (62,571)	161,127 (280,023)	76,670 (99,000)	286,732 (274,454)	150,094 (74,659)
Spain	7,004,852 (12,122,088)	3,649,949 (7,309,896)	1,277,836 (2,293,638)	1,046,810 (1,668,889)	137,524 (188,293)	892,733 (661,372)
Sweden	3,520,352 (5,195,995)	1,356,074 (2,628,033)	442,244 (707,643)	857,962 (1,157,835)	100,281 (91,666)	763,791 (610,818)
Switzerland	319,348 (487,358)	-	202,280 (321,883)	107,003 (146,796)	-	10,065 (18,679)
Turkey	3,124,784 (5,174,046)	1,165,413 (2,162,307)	1,068,503 (1,824,476)	709,149 (1,099,082)	-	181,719 (88,181)
United Kingdom	15,874,062 (24,140,368)	6,653,089 (12,321,756)	3,374,245 (6,011,907)	1,511,847 (2,068,390)	1,514,997 (1,430,761)	2,819,884 (2,307,554)
United States of America	15,411,409 (23,303,867)	7,462,532 (15,066,164)	528,806 (1,069,679)	1,456,256 (1,888,011)	2,917,012 (3,043,017)	3,046,803 (2,236,996)
Yugoslavia	2,681,879 (4,130,690)	230,880 (386,662)	1,044,636 (1,790,340)	1,301,878 (1,878,324)	33,649 (47,712)	70,836 (27,652)
Sub-total	187,327,812 (303,396,931)	72,121,351 (139,490,091)	53,407,453 (94,526,744)	25,725,255 (38,551,963)	11,693,295 (11,927,341)	24,380,458 (18,900,792)
<u>Open-registry countries</u>						
Bahamas	3,191,971 (5,681,862)	2,588,209 (4,939,652)	232,821 (410,007)	100,699 (148,267)	2,954 (5,498)	267,288 (178,438)

	Total	Oil tankers	Bulk carriers c/	General cargo d/	Container ships	Others
Bermuda	822,123 (1,307,260)	220,472 (416,954)	326,168 (546,117)	181,196 (249,675)	4,755 (6,508)	89,532 (88,006)
Cyprus	6,727,887 (11,801,233)	3,180,146 (6,203,866)	1,710,957 (2,910,888)	1,671,614 (2,522,722)	30,272 (43,418)	134,898 (120,339)
Liberia	62,024,700 (121,394,635)	34,112,490 (71,934,662)	21,651,044 (41,162,569)	2,528,508 (3,782,518)	484,949 (617,303)	3,247,709 (3,897,583)
Panama	37,244,233 (62,068,888	8,205,703 (16,108,576)	14,558,111 (25,897,474)	10,159,420 (15,528,894)	1,169,748 (1,441,878)	3,151,251 (3,092,066)
Sub-total:	110,010,914 (202,253,878)	48,307,020 (99,603,710)	38,479,101 (70,927,055)	14,641,437 (22,232,076)	1,692,678 (2,114,605)	6,890,678 (7,376,432)
<u>Socialist countries of Eastern Europe and Asia</u>						
<u>Socialist countries of Eastern Europe</u>						
Albania	56,133 (79,940)	-	-	54,894 (79,940)	-	1,239 (-)
Bulgaria	1,282,962 (1,840,794)	311,735 (508,354)	508,383 (803,462)	321,466 (430,131)	9,459 (9,141)	131,829 (89,706)
Czechoslovakia	184,299 (276,647)	-	102,589 (165,649)	81,710 (110,998)	-	-
German Democratic Repubic	1,421,714 (1,791,006	31,397 (54,807)	320,527 (507,333)	826,093 (1,083,338)	-	243,697 (145,528)
Hungary	79,994 (112,468)	-	-	79,994 (112,468)	-	-
Poland	3,267,281 (4,304,116)	237,026 (407,488)	1,244,162 (1,969,267)	1,383,773 (1,686,634)	-	402,320 (240,727)
Romania	2,666,820 (3,931,543)	295,435 (536,113)	1,250,264 (2,054,059)	850,316 (1,148,430)	-	270,805 (192,941)
Union of Soviet Socialist Republics	24,492,469 (27,928,263)	4,661,967 (7,158,198)	2,744,447 (4,393,609)	7,922,442 (10,266,312)	599,858 (619,847)	563,755 (5,490,297)
Sub-total	33,451,672 (40,264,777)	5,537,560 (8,664,960)	6,170,372 (9,893,379)	11,520,688 (14,918,251)	609,407 (628,988)	9,613,645 (6,159,199)
<u>Socialist countries of Asia</u>						
China	9,300,358 (13,940,209)	1,331,112 (2,125,045)	2,961,263 (4,990,472)	4,392,591 (6,161,758	143,638 (212,268)	471,754 (450,666)

	Total	Oil tankers	Bulk carriers c/	General cargo d/	Container ships	Others
Democratic People's Republic of Korea	459,958 (739,855)	171,219 (340,651)	53,136 (95,796)	189,229 (271,660)	-	46,374 (31,748)
Viet Nam	278,899 (410,975)	37,361 (63,487)	14,200 (23,706)	205,757 (314,806)	-	21,581 (8,976)
Sub-total	10,039,215 (15,091,039)	1,539,692 (2,529,183)	3,028,599 (5,109,974)	4,787,577 (6,748,224)	143,638 (212,268)	539,709 (491,390)
Sub-total: Socialist countries of Eastern Europe and Asia	43,490,887 (55,355,816)	7,077,252 (11,194,143)	9,198,971 (15,003,353)	16,308,265 (21,666,475)	753,045 (841,256)	10,153,354 (6,650,589)
Developing countries and territories of Africa						
Algeria	1,372,245 (1,984,586)	593,987 (1,130,592)	80,988 (129,181)	202,543 (292,253)	-	494,727 (432,560)
Angola	97,283 (138,555)	2,052 (3,036)	-	80,901 (126,501)	-	14,330 (9,018)
Benin	4,604 (4,880)	-	-	3,104 (4,550)	-	1,500 (330)
Cameroon	74,373 (87,752)	-	-	64,997 (82,834)	-	9,376 (4,918)
Cape Verde	13,690 (21,728)	-	-	11,789 (19,937)	-	2,501 (1,791)
Comoros	977 (1,793)	-	-	977 (1,793)	-	-
Congo	8,458 (10,840)	-	-	-	-	8,458 (10,840)
Djibouti	3,108 (2,853)	-	-	1,780 (2,300)	-	1,328 (553)
Egypt	778,591 (1,032,144)	104,030 (173,258)	120,849 (204,406)	441,115 (591,461)	-	112,597 (63,019)
Equatorial Guinea	6,412 (6,700)	-	-	6,412 (6,700)	-	-
Ethiopia	30,008 (46,797)	3,368 (5,228)	-	24,098 (37,777)	-	2,542 (3,792)
Gabon	97,267 (169,212)	74,471 (141,162)	-	19,018 (25,960)	-	3,778 (2,090)
Gambia	3,290 (4,223)	-	-	1,597 (2,900)	-	1,693 (1,323)

	Total	Oil tankers	Bulk carriers c/	General cargo d/	Container ships	Others
Ghana	186,123 (208,896)	-	-	123,747 (167,525)	-	62,376 (41,371)
Guinea	6,944 (2,927)	-	-	210 (185)	-	6,734 (2,742)
Guinea-Bissau	3,677 (2,523)	-	-	1,075 (1,020)	-	2,602 (1,503)
Ivory Goast	143,358 (173,679)	981 (1,170)	-	121,838 (155,347)	-	20,539 (17,162)
Kenya	6,652 (3,672)	-	-	1,168 (1,590)	-	5,484 (2,082)
Libyan Arab Jamahiriya	854,700 (1,514,077)	745,056 (1,409,288)	-	63,769 (82,074)	-	45,875 (22,715)
Madagascar	77,886 (106,782)	8,264 (13,487)	-	60,937 (86,713)	-	8,685 (6,582)
Malawi	1,348 (400)	424 (300)	-	-	-	924 (100)
Mauritania	15,152 (7,094)	-	-	1,880 (2,685)	-	13,272 (4,409)
Mauritius	41,611 (57,455)	-	16,432 (29,321)	19,336 (24,978)	-	5,843 (3,156)
Moroeco	433,893 (641,229)	61,623 (111,050)	102,757 (174,643)	74,764 (117,530)	-	194,749 (238,006)
Mozambique	45,753 (45,822)	6,549 (10,619)	-	17,679 (27,043)	-	21,525 (8,160)
Nigeria	442,030 (609,740)	156,558 (302,071)	-	245,328 (287,688)	-	40,144 (19,981)
Sao Tome and Principe	993 (992)	-	-	-	-	993 (992)
St. Helena	3,150 (2,264)	-	-	-	-	3,150 (2,264)
Senegal	44,056 (33,583)	3,620 (4,970)	-	9,967 (14,916)	-	30,469 (13,697)
Seychelles	1,160 (321)	-	-	-	-	1,160 (321)
Sierra Leone	5,573 (1,324)	-	-	-	-	5,573 (1,324)
Somalia	28,053 (29,291)	-	-	22,013 (24,886)	-	6,040 (4,405)

	Total	Oil tankers	Bulk carriers c/	General cargo d/	Container ships	Others
Sudan	96,134 (128,223)	-	-	93,474 (127,451)	-	2,660 (772)
Togo	29,980 (43,199)	-	-	28,842 (42,640)	-	1,138 (559)
Tunisia	277,403 (449,511)	131,836 (259,350)	37,230 (58,572)	48,140 (60,223)	-	60,197 (71,366)
United Republic of Tanzania	58,699 (70,991)	3,182 (4,952)	-	40,798 (58,851)	-	14,719 (7,188)
Uganda	1,800 (2,700)	-	-	1,800 (2,700)	-	-
Zaire	84,720 (121,416)	-	-	70,626 (106,673)	-	14,094 (14,743)
Sub-total	5,381,154 (7,770,174)	1,896,001 (3,570,533)	358,256 (596,123)	1,905,122 (2,587,684)	-	1,221,775 (1,015,834)
Developing countries and territories of America						
Anguilla	4,067 (5,534)	-	-	3,854 (5,534)	-	213 (-)
Antigua	559 (443)	-	-	296 (443)	-	263 (-)
Argentina	2,422,111 (3,498,236)	860,388 (1,378,675)	451,458 (758,165)	828,757 (1,140,981)	13,763 (18,332)	267,745 (202,083)
Barbados	8,414 (9,466)	-	-	4,474 (9,401)	-	3,940 (65)
Belize	620 (805)	-	-	620 (805)	-	-
Bolivia	14,913 (18,934)	-	-	14,913 (18,934)	-	-
Brazil	5,721,821 (9,420,398	1,810,954 (3,321,970)	2,404,551 (4,098,804)	1,220,872 (1,682,998)	22,600 (24,740)	262,844 (291,886)
Cayman Islands	347,825 (510,455	58,857 (110,105)	50,952 (84,997)	176,713 (276,865)	3,695 (5,564)	57,608 (32,924)
Chile	472,934 (731,511)	27,417 (45,260)	223,583 (436,059)	117,779 (163,403)	-	104,155 (86,789)
Colombia	373,828 (480,556	30,744 (49,854)	47,324 (70,827)	287,175 (358,460)	-	8,585 (1,415)

	Total	Oil tankers	Bulk carriers c/	General cargo d/	Container ships	Others
Costa Rica	19,750 (19,262	-	-	11,424 (16,604)	-	8,326 (2,658)
Cuba	959,171 (1,230,077)	68,184 (103,326)	61,907 (100,039)	641,823 (870,928)	-	187,257 (155,784)
Dominica	890 (1,243)	-	-	890 (1,243)	-	-
Dominican Republic	37,192 (57,971)	1,492 (2,632)	9,420 (16,040)	20,698 (32,549)	-	5,582 (6,750)
Ecuador	411,641 (578,805)	162,930 (287,261)	11,153 (20,189)	206,435 (249,035)	-	31,123 (22,320)
El Salvador	3,501 (3,318)	-	-	-	-	3,501 (3,318)
Falkland Islands f/	6,907 (4,125)	-	-	537 (630)	-	6,370 (3,495)
Grenada	425 (577)	-	-	321 (435)	-	104 (142)
Guatemala	16,046 (24,138)	-	-	15,569 (24,138)	-	477 (-)
Guyana	(24,231 (22,377)	933 (955)	-	10,222 (14,950)	-	13,076 (6,472)
Haiti	1,762 (851)	-	-	247 (361)	-	1,515 (490)
Honduras	276,736 (390,304)	48,107 (89,985)	-	203,944 (284,513)	3,579 (4,066)	21,106 (11,740)
Jamaica	9,419 (12,878)	-	-	4,358 (7,703)	3,428 (5,110)	1,633 (65)
Mexico	1,489,120 (2,146,277)	663,372 (1,142,700)	212,763 (355,157)	173,161 (237,640)	-	439,824 (410,780)
Montserrat	711 (1,016)	-	-	711 (1,016)	-	-
Nicaragua	19,291 (27,304)	4,398 (7,447)	-	13,180 (19,857)	-	1,713 (-)
Paraguay	37,799 (44,298)	2,935 (3,880)	-	29,261 (37,840)	-	5,603 (2,578)
Peru	787,746 (1,045,912)	166,143 (289,836)	185,345 (312,798)	253,299 (364,299)	-	182,959 (78,979)
Saint Christopher and Nevis	556 (459)	-	-	300 (368)	-	256 (91)

	Total	Oil tankers	Bulk carriers c/	General cargo d/	Container ships	Others
Saint Lucia	2,920 (3,732)	-	-	2,563 (3,732)	-	357 (-)
Saint Vincent and the Grenadines	101,176 (154,762)	6,870 (7,849)	78,403 (124,145)	14,765 (21,931)	-	1,138 (837)
Suriname	15,222 (19,187)	208 (360)	-	11,441 (16,286)	1,343 (1,771)	2,230 (770)
Trinidad and Tobago	18,969 (12,376)	-	-	3,673 (4,616)	-	15,296 (7,760)
Turks and Caicos Islands	2,616 (3,310)	890 (1,450)	-	1,190 (1,860)	-	536 (-)
Uruguay	190,309 (288,409)	94,933 (169,063)	13,203 (22,165)	58,689 (80,081)	-	23,484 (17,100)
Venezuela	1,003,381 (1,460,527)	562,072 (906,528)	53,712 (91,291)	261,936 (384,745)	-	125,661 (77,963)
Virgin Islands (British)	7,565 (8,580)	-	-	5,648 (7,711)	-	1,917 (869)
Sub-total	14,812,144 (22,238,413)	4,571,827 (7,919,136)	3,803,774 (6,490,676)	4,601,738 (6,342,895)	48,408 (59,583)	1,786,397 (1,426,123)
Developing countries and territories of Asia						
Bahrain	44,470 (59,167)	2,896 (4,162)	16,623 (29,443)	9,110 (15,166)	-	15,841 (10,396)
Bangladesh	366,858 (496,935)	50,643 (83,275)	-	280,916 (397,102)	-	35,299 (16,558)
Brunei	853 (961)	-	-	-	-	853 (961)
Burma	108,384 (128,316)	2,437 (3,588)	-	81,774 (113,544)	-	24,173 (11,184
Democratic Kampuchea	3,558 (3,839)	-	-	998 (1,481)	-	2,560 (2,358)
Hong Kong	5,784,336 (9,586,082)	582,509 (1,069,896)	4,367,196 (7,569,578)	337,419 (430,276)	310,401 (338,746)	186,811 (177,586)
India	6,414,741 (10,368,343)	1,320,873 (2,304,207)	3,052,915 (5,319,442)	1,801,348 (2,577,933)	1,399 (1,870	238,206 (164,891)
Indonesia	1,856,967 (2,627,275)	420,456 (724,513)	148,530 (244,683)	935,801 (1,375,803)	58,937 (74,130)	293,243 (208,146)

	Total	Oil tankers	Bulk carriers c/	General cargo d/	Container ships	Others
Iran (Islamic Republic of)	2,105,549 (3,410,649)	917,680 (1,729,836)	526,863 (906,379)	454,852 (633,295)	-	206,154 (141,139)
Iraq	1,073,871 (1,790,466)	797,055 (1,471,583)	-	152,152 (211,903)	-	124,664 (106,980)
Jordan	48,300 (75,525)	-	25,948 (43,832)	22,176 (31,693)	-	176 (-)
Kuwait	2,551,074 (3,879,889)	1,430,825 (2,498,150)	-	409,401 (620,834)	265,066 (271,168)	445,782 (489,737)
Lebanon	458,000 (696,676)	14,087 (23,246)	62,918 (112,047)	306,670 (465,895)	1,946 (1,543)	72,379 (93,945)
Malaysia	1,664,312 (2,409,607)	215,658 (364,502)	427,868 (762,824)	399,469 (590,269)	180,405 (214,020)	440,912 (477,992)
Maldives	136,564 (204,124)	1,377 (1,981)	52,062 (86,359)	79,770 (113,273)	-	3,355 (2,511)
Oman	13,911 (12,129)	432 (542)	-	3,259 (5,650)	-	10,220 (5,937)
Pakistan	506,586 (733,519)	43,429 (89,937)	11,950 (17,527)	430,514 (615,920)	-	20,693 (10,135)
Philippines	3,441,076 (5,525,609)	554,619 (1,066,164)	1,595,119 (2,781,426)	960,566 (1,429,543)	11,168 (17,480)	319,604 (230,996)
Qatar	332,907 (482,172)	76,776 (144,019)	-	142,171 (219,035)	88,181 (95,523)	25,779 (23,595)
Republic of Korea	6,771,402 (11,211,472)	1,024,445 (2,053,538)	3,856,064 (6,805,358)	1,000,201 (1,579,023)	306,986 (329,167)	583,706 (444,386)
Saudi Arabia	3,863,272 (6,475,117)	1,950,528 (3,744,100)	455,128 (768,268)	846,824 (1,191,492)	82,556 (99,362)	528,236 (671,895)
Singapore	6,512,344 (11,038,251)	2,080,930 (4,055,703)	2,043,836 (3,719,249)	1,422,201 (2,087,749)	686,332 (864,970)	279,045 (310,580)
Sri Lanka	745,697 (1,203,057)	191,565 (342,554)	281,489 (512,326)	262,339 (344,655)	-	10,304 (3,522)
Syrian Arab Republic	56,156 (81,871)	-	-	54,610 (80,962)	-	1,546 (909)
Thailand	517,444 (759,136)	139,850 (245,044)	12,343 (20,180)	300,107 (430,503)	11,658 (16,006)	53,486 (47,403)
United Arab Emirates	766,493 (1,349,672)	513,417 (1,007,213)	39,676 (63,710)	168,370 (240,141)	-	45,030 (38,608)
Yemen	3,203 (1,850)	-	-	1,260 (1,850)	-	1,943 (-)

	Total	Oil tankers	Bulk carriers c/	General cargo d/	Container ships	Others
Yemen (Democratic)	12,495 (13,455)	1,886 (3,185)	-	3,207 (4,768)	-	7,402 (5,502)
Sub-tetal	46,160,823 (74,625,164)	12,334,373 (23,030,938)	16,976,528 (29,762,631)	10,867,485 (15,809,758)	2,005,035 (2,323,985)	3,977,402 (3,697,852)
<u>Developing countries of Europe</u>						
Malta	1,366,149 (2,102,016)	69,843 (131,214)	622,587 (1,042,092)	656,358 (925,249)	-	17,361 (3,461)
Sub-total	1,366,149 (2,102,016)	69,843 (131,214)	622,587 (1,042,092)	656,358 (925,249)	-	17,361 (3,461)
<u>Develeping oountries and territories of Oceania</u>						
Fiji	29,216 (27,754)	4,933 (7,473)	-	13,776 (13,288)	-	10,507 (6,993)
Kiribati	2,272 (1,832)	-	-	1,701 (1,470)	-	571 (362)
Nauru	66,725 (93,391)	-	36,976 (59,321)	27,853 (33,557)	-	1,896 (513)
Papua New Guinea	25,760 (29,906)	2,421 (3,581)	-	10,884 (15,293	-	12,455 (11,032)
Solomon Islands	5,811 (4,552)	-	-	2,280 (2,638)	-	3,531 (1,914)
Tonga	16,038 (21,168)	-	-	12,234 (18,510)	-	3,804 (2,658)
Tuvalu	526 (458)	-	-	353 (250)	-	173 (208)
Vanuatu	89,591 (161,352)	-	56,891 (110,141)	27,876 (45,390)	-	4,824 (5,821)
Samoa	26,087 (35,293)	-	-	24,930 (34,867)	-	1,157 (426)
Sub-total	262,026 (375,706)	7,354 (11,054)	93,867 (169,462)	121,887 (165,263)	-	38,918 (29,927)
Sub-total: developing countries and territories	67,982,296 (107,111,473)	18,879,398 (34,662,875)	21,855,012 (38,060,984)	18,152,590 (25,030,849)	2,053,443 (2,383,568)	7,041,853 (6,173,197)
Other, unallocated	3,958,418 (6,361,639)	628,244 (1,159,574)	2,127,563 (3,836,441)	366,188 (557,352)	720,525 (769,820)	115,898 (38,452)

Source: Lloyd's Register of Shipping: Statistical Tables, 1984 (London), and supplementary data regarding the Great Lakes fleets of the United States and Canada and the United States Reserve Fleet.

a/ The designations employed and the presentation of material in this table refer to flags of registration and do not imply the expression of any opinion by the Secretariat of the United Nations concerning the legal status of any country or territory, or of its authorities, or concerning the delimitation of its frontiers.

b/ Ships of 100 grt and over, excluding the Great Lakes fleets of the United States of America and Canada and the United States Reserve Fleet.

c/ Ore and bulk carriers of 6,000 grt and over, including ore/bulk/oil carriers.

d/ Including passenger/cargo.

e/ Excluding estimates of the United States Reserve Fleet and United States and Canadian Great Lakes fleets, which amounted respectively to 2.2 m.grt (2.8 m.dwt), 1.7 m.grt (3.1 m.dwt) and 2.0 m.grt (2.9 m.dwt).

f/ A dispute exists between the Governments of Argentina and the United Kingdom of Great Britain and Northern Ireland concerning sovereignty over the Falkland Islands (Malvinas).

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