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Contents

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Editorial

Dear readers:

Trade grows faster than GDP, and this trade requires frequent, fast and reliable transport services. Accordingly, UNCTAD's Commission on Enterprise, Business Facilitation and Development "recognizes the importance of access to adequate transport and logistics services by developing countries" and reconfirms the mandate of UNCTAD's secretariat to continue to keep under review and monitor developments relating to efficient transport and trade facilitation and examine their implications for developing countries (page 4).

As a contribution to this endeavour, the present issue of the Transport Newsletter includes several articles about different aspects of trade efficiency, including transport connectivity (page 4), transport costs (page 17), and trade and transport facilitation (pages 17 and 19).

UNCTAD's *Review of Maritime Transport, 2004* is now available on-line (page 13), as well as fleet statistics from previous issues of the Review (page 16). Newly available from UNCTAD, in French language, is a Multimodal Transport Course (page 20).

As most readers will know, UNCTAD's now quarterly "Transport Newsletter" is the successor of UNCTAD's annual "Port Newsletter", which used to be distributed in printed format only. Readers may be pleased to learn that the issues of past Port and Transport Newsletters from between 1995 and today are now also available on-line (page 16).

For feedback, comments, and suggestions for our next Transport Newsletter (2nd Quarter 2005), please contact Jan Hoffmann at jan.hoffmann@unctad.org before June.

With kind regards from the Palais des Nations,

Your Team of the Trade Logistics Branch.

Geneva, March 2005

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UNCTAD Commission on Enterprise, Business Facilitation and Development

The ninth session of the Commission on Enterprise, Business Facilitation and Development was held from 22 to 25 February 2005 at the Palais des Nations, Geneva. Among the substantive items that were discussed was "Efficient Transport and Trade Facilitation to Improve Participation by Developing Countries in International Trade".[1] The Commission reviewed the "Progress Report on the Implementation of the Agreed Recommendations of the Commission at its Eighth Session"[2] and agreed on a new set of recommendations.[3]

In its new recommendations, the Commission "recognizes the importance of access to adequate transport and logistics services by developing countries as a prerequisite for the achievement of the international development goals, including those contained in the Millennium Declaration, particularly for countries with special needs."

Given the long-term nature of the problems addressed in the area of transport and trade facilitation and based on the São Paulo consensus, the Commission agreed that the UNCTAD secretariat should continue to (a) Keep under review and monitor developments relating to efficient transport and trade facilitation and examine their implications for developing countries; (b) provide assistance to developing countries in the ongoing negotiations relating to the Doha Development Agenda at the WTO; (c) Provide technical assistance and capacity building activities in the area of transport and trade facilitation, including on the use of automated systems to improve international trade and transport management; (d) monitor developments and disseminate information on security measures affecting the international trade and transport of developing countries and analyse their potential implications; and (e) Cooperate with other intergovernmental and non-governmental organizations in their work relating to the development of international legal instruments affecting international transport and trade facilitation, including multimodal transport.

It was agreed that the topic of the next Expert Meeting is to be "Trade Facilitation as an Engine for Development". This Expert Meeting is scheduled to take place on 21-23 September 2005.

For further information visit
http://www.unctad.org/Templates/meeting.asp?intItemID=1942&lang=1&m=9475

Liner Shipping Connectivity

An article in a previous issue of the Transport Newsletter (3rd Quarter 2004) discussed recent developments regarding a "new geography of trade". It reviewed recent literature and ongoing research concerning the determinants of trade, i.e. the question of who trades what with whom. Among the relevant aspects that are considered to have an impact on the competitiveness of nations and on the geography of trade are geographical factors such as distance from major markets or being a landlocked country, which are reflected in transport costs. Another important – but often neglected – determinant of competitiveness is transport connectivity, i.e. access to regular and frequent transport services.

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[1] See also the background document TD/B/COM.3/67 "Efficient Transport and Trade Facilitation to Improve Participation by Developing Countries in International Trade" prepared by the UNCTAD secretariat; available under http://www.unctad.org/en/docs/c3d67_en.pdf .
[2] See document TD/B/COM.3/66 available at http://www.unctad.org/en/docs/c3d66_en.pdf .
[3] See document TD/B/COM.3/L.30 available at http://www.unctad.org/en/docs/c3l30_en.pdf for the field of transport and trade facilitation.

Except for bulk commodities, most intercontinental trade is transported by liner shipping services. Access to such services is thus a crucial aspect of competitiveness and hence also of the geography of trade. In this article, we present possible measures that could serve as indicator for available liner shipping services in different countries.

The indicators are generated from data obtained through Containerisation International Online (www.ci-online.co.uk; accessed in July 2004). They reflect the services, vessels and their TEU[4] capacity deployed by international liner shipping companies.

1) Deployment of container ships

The "fleet deployment" is the number of ships that national and international liner shipping companies deploy on the liner services from and to the country's ports. A larger number of ships is an indicator that a country's shippers have more opportunities to load their containerized exports, i.e. that they are better connected to foreign markets.[5]

Table 1 shows the ten economies with the highest number of container ships deployed on liner services from and to their ports.

Table 1: Fleet assignment (number of ships)

Rank	Country	Ships
1	China	1 228
2	Hong Kong, China	1 166
3	United States	1 074
4	Singapore	916
5	United Kingdom	861
6	Germany	810
7	Netherlands	785
8	Belgium	774
9	Japan	756
10	Korea, Republic of	734

Source: www.ci-online.co.uk, *July2004.*

The country with the largest number of deployed container ships is China (1,228 vessels), followed by Hong Kong (China) (1,166) and the United States (1,074). In Latin America, ports in Panama receive the largest number of ships (243) and in Africa the leading country is Egypt (336). Panama and Egypt both benefit from their geographic position and their canals. The deployment of vessels to Panama, for example, is not a reflection of the volume of Panamanian containerized trade but rather of the leading position of Panamanian ports as transshipment centres at both ends of the canal. It is thanks to these transshipment ports that Panamanian exporters have access to a much larger number of deployed ships than exporters in neighbouring countries Colombia (184 ships) and Costa Rica (87).

The average fleet assignment to Least Developed Countries (LDCs)[6] is only one-seventh of the average of Non-LDCs and only 1.9 per cent of that of China.

[4] TEU stands for a twenty-foot equivalent unit. The number of TEU thus reflects the container carrying capacity of a ship.

[5] Although ships do not arrive empty and not the entire deployed capacity is actually available for a country's exports, it can be assumed that, on average, the number of deployed capacity is approximately proportional to the actually available capacity.

[6] For a list of LDCs see the United Nations OHRLLS at http://www.un.org/special-rep/ohrlls/ldc/list.htm.

2) Deployment of container carrying capacity (TEU)

A similar picture is obtained if we look at the deployment of container carrying capacity, i.e. considering the number slots for 20 foot equivalent units (TEU). China (3.93 million TEU), Hong Kong (China) (3.75 million) and the United States (2.98 million) are the three countries where the largest fleets are being deployed (Table 2). Egypt (854,203) and Panama (703,432) continue to lead in Africa and Latin America, respectively. In South America, Brazils ports (464,490) receive most TEU capacity; in Sub-Saharan Africa, the highest TEU capacity is deployed in South African ports (382,351); and in South Asia, ports in Sri Lanka (668,033) receive 56 per cent more TEU slots than India (427,443). Indian containerized trade is often transshipped in Sri Lanka, and the latter's exporters and importers thus benefit from the situation of Colombo as a major transshipment centre.

The Republic of Yemen (129,773), Senegal (95,961) and Benin (92,962) are the three LDCs with the largest fleet deployment in their ports. On average, LDCs receive only 7 per cent of the TEU capacity of Non-LDCs, and only 0.7 per cent of that of China.

Table 2: Fleet assignment (TEU)

Rank	Country	TEU
1	China	3 928 913
2	Hong Kong, China	3 749 697
3	United States	2 978 193
4	Singapore	2 471 635
5	Germany	2 249 857
6	United Kingdom	2 169 336
7	Korea, Republic of	2 110 367
8	Netherlands	2 083 832
9	Taiwan Province of China	1 959 434
10	Japan	1 926 790

3) Deployment of container ships per capita

In absolute terms, traders in smaller countries will most likely have access to fewer ships calling at national ports than traders in larger countries. Yet, there exists a number of smaller countries that have managed to attract additional liner services by providing transshipment port services. Most containers in Malta, the Bahamas and Singapore are transshipped, i.e. after being discharged, they are reloaded onto a different containership for further distribution. These additional liner shipping services help to increase a country's connectivity in spite of perhaps limited national trade. In other words, national exporters and importers benefit from liner services that initially call at its ports to make use of its transshipment facilities, yet at the same time will also offer to transport imports and exports. In order to account for a country's "size", the vessel deployment at a country's ports can be divided by its population, thus generating the vessel deployment per capita (Table 3).

Particularly small island states, which depend on imports for most of their consumer goods, do attract relatively large numbers of container ships. The highest vessel deployment per capita is recorded for those island states that have managed to become transshipment centres, such as Malta (286 ships per million inhabitants), The Bahamas (225), and Singapore (222). St. Kitts and Nevis, Aruba, and Antigua and Barbuda, too, have developed as regional hub ports for neighbouring Caribbean economies, receiving many, albeit relatively small, container carrying ships. Bangladesh (0.27 ships per million inhabitants), India (0.24), Iraq (0.21) and the Democratic Republic of Congo (0.17) are the countries which receive the smallest number of ships per inhabitant.

Table 3: Fleet assignment (ships) per capita

Rank	Country	Ships per million capita
1	Malta	286
2	St. Kitts and Nevis	266
3	Bahamas	226
4	Singapore	222
5	American Samoa	214
6	Aruba	178
7	Hong Kong, China	173
8	French Polynesia	143
9	Marshall Islands	133
10	Antigua and Barbuda	131

4) Deployment of container carrying capacity per capita

Malta, Singapore and Hong Kong (China) are the countries in whose ports the largest container carrying capacity per capita of the population is deployed. Most of the top ten countries (Table 3) are islands and most are also host to important hub ports. Hong Kong and Belgium are host to container terminals that serve as hub ports for neighbouring countries; and Panama and the United Arab Emirates are also host to important regional free-zones. The Czech Republic (0.02 TEU per 1000 capita) and Paraguay (0.04) are among the countries that report the lowest TEU assignment per capita; both countries are practically landlocked and only report few river transport liner services on barges that connect their capitals to neighbouring countries' seaports.

Table 4: Fleet assignment (TEU) per capita

Rank	Country	TEU per 1000 capita
1	Malta	637
2	Singapore	598
3	Hong Kong, China	558
4	Bahamas	534
5	Panama	243
6	United Arab Emirates	230
7	Aruba	230
8	French Polynesia	229
9	Guam	197
10	Belgium	162

5) Number of liner shipping companies

European countries are those that are being served by the highest number of liner shipping companies. Ports in the United Kingdom (133 shipping lines) provide services to intercontinental, regional and also cabotage liner shipping companies. Rotterdam (Netherlands), Antwerp (Belgium), Hamburg and Bremerhaven (Germany), and Le Havre (France) are the main Northern European ports that connect short sea shipping feeder companies services with intercontinental East-West and also North-South shipping lines.

At the other end of the spectrum, Albania, Czech Republic, Greenland, Iraq, Palau, Paraguay, and Sao Tome and Principe are reported with only one shipping line to provide regular maritime transport services to the port(s) of their countries.

Table 5: Liner companies providing services to the country's ports

Rank	Country	Lines
1	United Kingdom	133
2	Netherlands	131
3	Belgium	123
4	Germany	114
5	France	105
6	Singapore	98
7	China	96
8	Hong Kong, China	93
9	Spain	91
10	Italy	87

Note: Not all liner companies provide the service with their own vessels.
The figures thus also include companies who charter slots with other companies.

6) Liner services

Usually, shipping lines provide more than just one regular service. On average, the number of liner services provided per country is almost four times the number of liner companies. In the case of China, each liner shipping company provides an average of more than six different liner services. The countries, whose ports are served by the widest range of regular shipping services are China (863 services), Hong Kong (China) (738) and Singapore (669). In Europe, the United Kingdom is connected to overseas markets by the largest number of liner services (538).

Table 6: Liner services from the country's ports

Rank	Country	Liner services
1	China	863
2	Hong Kong, China	738
3	Singapore	669
4	United States	623
5	Korea, Republic of	569
6	Japan	539
7	United Kingdom	538
8	Netherlands	506
9	Germany	472
10	France	446

Note: Includes some double counting if services are being sold under different names.

In Africa, the first position is held by Egypt (196); and in Latin America, Brazil's ports receive more different liner services (147) than Panama (119). The average number of liner services provided to LDCs is only one seventh of the average number provided to Non-LDCs; and the largest number provided to an LDC (Senegal) is only one twentieth of that provided to China.

7) Average vessel sizes

Ships are a classical example of economies of scale.[7] Companies that operate larger vessels are usually in a position to offer their services at a lower price. Hong Kong (China) (average

[7] "A ship's carrying power varies as the cube of her dimensions, while the resistance offered by the water increases only a little faster than the square of her dimensions; so that a large ship requires less coal in proportion to its tonnage than a small one. It also requires less labour, especially that of navigation; while to passengers it

vessel size of 3,216 TEU), Oman (3,215), and China (3,199) are the three economies whose ports receive the container ships with the largest average container carrying capacity. In western Asia, Oman's port Salalah is an important intercontinental transshipment centre that caters mostly for large vessels on the East-West routes. All countries among the top ten (Table 7) are mostly receiving ships on the main East-West trades.

In South America, Argentina receives the largest vessels on average (2,159) and in sub-Saharan Africa the first position is held by Mauritius (1,924), which has become an important subregional transshipment centre in recent years. Switzerland (245), Paraguay (119) and Czech Republic (42) are among the countries with the lowest average vessels sizes, which is explained by their situation of being landlocked countries with river ports that can only receive small container carrying barges.

Table 7: Average vessel sizes

Rank	Country	Ship size average
1	Hong Kong, China	3 216
2	Oman	3 215
3	China	3 199
4	Taiwan, Province of China	3 115
5	Canada	3 022
6	Malaysia	2 919
7	Panama	2 895
8	Saudi Arabia	2 882
9	Korea, Republic of	2 875
10	Germany	2 778

8) Maximum vessel sizes

The largest ships that call at a country's ports indicate what maximum economies of scale are achievable. Countries that are capable to receive the largest vessels must have deep ports and efficient container handling equipment. Only the countries listed in Table 8 effectively receive vessels of above 8,000 TEU container carrying capacity (data is for July 2004).

In Latin America, Panama (6,555 TEU) receives the largest container ships, and in sub-Saharan Africa, the largest ships call at South Africa (3,501) and Mauritius (3,469).

offers greater safety and comfort, more choice of company and better professional attendance. In short, the small ship has no chance of competing with the large ship between ports which large ships can easily enter, and between which the traffic is sufficient to enable them to fill up quickly." From: *Principles of Economics*, by Alfred Marshall (1890), Book Four: The Agents of Production: Land, Labour, and Capital and Organization. Chapter 11, Industrial Organization: Production on a Large Scale.

Table 8: Maximum vessel sizes

Rank	Country	Ship size maximum
1	China	8 238
	Hong Kong, China	8 238
	United States	8 238
4	Belgium	8 076
	Germany	8 076
	Malaysia	8 076
	Netherlands	8 076
	United Kingdom	8 076
9	Singapore	8 063
	Taiwan, Province of China	8063

9) Vessels per liner shipping company

Economies of scale also exist as regards the number of operated vessels per liner shipping company. The United States (almost 14 vessels per liner company), Taiwan Province of China (14.4) and China (12.8) are the countries with the largest scale of operation.

The small island states of Bermuda, Cayman Islands, Kiribati, Sao Tome and Principe and Seychelles are the countries where each liner company that is calling at these countries' ports is only operating one single vessel on the route(s) that serve these islands.

Table 9: Vessels operated per liner shipping company

Rank	Country	Ships per line
1	United States	14.0
2	Taiwan Province of China	13.4
3	China	12.8
4	Hong Kong, China	12.5
5	Cote d'Ivoire	12.5
6	Oman	10.4
7	Puerto Rico	9.9
8	Singapore	9.4
9	Korea, Republic of	9.2
10	Japan	9.1

This indicator is derived by combining the data from Tables 1 and 5.

A liner shipping connectivity indicator

If we combine the available information about fleet assignment, liner services, and vessel and fleet sizes, it is possible to generate an overall "liner shipping connectivity indicator" (Table 10).[8]

[8] The indicator is calculated as follows: First, each one of the nine individual indicators is standardized so that all nine indicators have the same maximum value of 1.0 and minimum value or 0.0. Second, for each country, the average indicator is calculated. Third, the maximum average is identified (in this case, it is the value for Hong Kong). Fourth, all values are divided by this maximum. Like this, the maximum value of the indicator becomes 1.0.

Table 10: Liner shipping connectivity indicator

Rank	Country	Index
1	Hong Kong, China	1.000
2	Singapore	0.904
3	China	0.847
4	United States	0.743
5	Netherlands	0.683
6	United Kingdom	0.665
7	Belgium	0.649
8	Germany	0.646
9	Taiwan Province of China	0.635
10	Korea, Republic of	0.627
11	Japan	0.607
12	Malaysia	0.590
13	France	0.584
14	Malta	0.545
15	Italy	0.510
16	Spain	0.482
17	Panama	0.476
18	United Arab Emirates	0.466
19	Bahamas	0.460
20	Canada	0.416
21	Egypt	0.414
22	Oman	0.409
23	Saudi Arabia	0.409
24	Sri Lanka	0.374
25	Greece	0.321
26	India	0.310
27	Thailand	0.304
28	Jamaica	0.301
29	Mexico	0.296
30	Brazil	0.292
31	Australia	0.278
32	South Africa	0.266
33	French Polynesia	0.258
34	New Zealand	0.258
35	Israel	0.254
36	Yemen, Republic of	0.253
37	Argentina	0.252
38	Trinidad and Tobago	0.252
39	Guam	0.249
40	Côte d'Ivoire	0.249
41	Indonesia	0.247
42	Mauritius	0.246
43	Turkey	0.243
44	Aruba	0.239
45	Uruguay	0.239
46	Puerto Rico	0.237
47	Pakistan	0.232
48	Colombia	0.223
49	Slovenia	0.223
50	St. Kitts and Nevis	0.222
51	Chile	0.220
52	Ecuador	0.218
53	New Caledonia	0.214
54	Peru	0.213
55	Cyprus	0.203
56	Venezuela	0.198
57	American Samoa	0.196
58	Netherlands Antilles	0.189
59	Togo	0.187
60	Senegal	0.186
61	Ghana	0.185
62	Portugal	0.182
63	Congo, Republic of	0.182
64	Gabon	0.181
65	Sweden	0.178
66	Nigeria	0.176
67	Iran, Islamic Republic of	0.175
68	Guatemala	0.172
69	Benin	0.171
70	Costa Rica	0.171
71	Philippines	0.169
72	Romania	0.162
73	Finland	0.162
74	Cameroon	0.159
75	Estonia	0.154
76	Jordan	0.152
77	Dominican Republic	0.151
78	Angola	0.149
79	Barbados	0.148
80	Djibouti	0.146
81	Denmark	0.145
82	Norway	0.143
83	Namibia	0.141
84	Samoa	0.139
85	Comoros	0.138
86	Honduras	0.138
87	Croatia	0.137
88	Marshall Islands	0.137
89	Viet Nam	0.134
90	Faeroe Islands	0.134
91	Russian Federation	0.131
92	Latvia	0.130
93	Ukraine	0.130
94	Fiji	0.125
95	Lebanon	0.124
96	El Salvador	0.124
97	Nicaragua	0.123
98	Greenland	0.122
99	Syrian Arab Republic	0.122
100	Equatorial Guinea	0.121
101	Madagascar	0.118
102	Antigua and Barbuda	0.118
103	Tanzania	0.115
104	Guinea	0.115
105	Cuba	0.114
106	Iceland	0.114
107	Ireland	0.113
108	St. Vincent & the Grenadines	0.112
109	St. Lucia	0.112
110	Algeria	0.111
111	Lithuania	0.110
112	Dominica	0.110
113	Seychelles	0.109
114	Sierra Leone	0.109
115	Morocco	0.106
116	Suriname	0.105
117	Liberia	0.105
118	Grenada	0.105
119	Mauritania	0.104
120	Vanuatu	0.102
121	Bahrain	0.101
122	Virgin Islands (U.S.)	0.101
123	Tonga	0.101
124	Micronesia, Fed. Sts.	0.100
125	Papua New Guinea	0.099
126	Kuwait	0.099
127	Gambia	0.099
128	Mozambique	0.098
129	Bangladesh	0.096
130	Guyana	0.095
131	Belize	0.093
132	Sudan	0.092
133	Maldives	0.090
134	Kenya	0.090
135	Poland	0.090
136	Northern Mariana Islands	0.089
137	Tunisia	0.088
138	Solomon Islands	0.087
139	Palau	0.086
140	Brunei	0.086
141	Qatar	0.083
142	Libyan Arab Jamahiriya	0.077
143	Cayman Islands	0.077
144	Bulgaria	0.074
145	Kiribati	0.072
146	Haiti	0.067
147	Yugoslavia, Fed. Rep.	0.067
148	Somalia	0.065
149	Georgia	0.065
150	Cambodia	0.064
151	Switzerland	0.063
152	Myanmar	0.062
153	Eritrea	0.062
154	Iraq	0.060
155	Czech Republic	0.059
156	Bermuda	0.055
157	Congo, Dem. Rep.	0.054
158	Guinea-Bissau	0.042
159	Cape Verde	0.040
160	Sao Tome and Principe	0.029
161	Paraguay	0.026
162	Albania	0.014

The highest indicator is computed for Hong Kong (China), followed by Singapore, China, United States and the Netherlands. Based on this indicator, Panama and the Bahamas are the best connected countries in the Americas, and Egypt and South Africa the best connected countries in Africa.

Countries that are being served by practically the same liner services, such as for example Chile, Ecuador and Peru, also have equivalent liner connectivity indicators.

The average connectivity indicator for LDCs is 45 per cent of that of non-LDCs, and only 11 per cent of that of Hong Kong, China. The best connected LDC is the Republic of Yemen, ranked 36, which owes its relatively favourable position to its location near the main East-West trade route. The best connected African LDCs are Togo and Senegal, ranked 59 and 60 respectively.

Of the fifteen least connected countries, more than half are LDCs (Somalia, Cambodia, Myanmar, Eritrea, Democratic Republic of the Congo, Guinea-Bissau, Cape Verde, São Tome and Principe). Albania is mostly being serviced by ports in neighbouring countries, and Bermuda's small volume of trade in goods is moved by air and non-containerized maritime transport. The remaining least-connected countries are either quasi landlocked (Paraguay, Georgia, Switzerland and the Czech Republic) or torn by armed conflict (Iraq, which is partly serviced through ports in Kuwait). The quasi landlocked countries have only limited access to deep sea liner shipping services through river transport or the Black Sea; their situation could be compared to landlocked countries, whose liner shipping connectivity index would by definition be Zero.

Causes and impacts

The main "cause" of liner shipping connectivity is each country's own volume of containerized trade, which attracts liner shipping services. It can be said that "supply follows demand". At the same time, however, demand also follows supply. Increased connectivity, together with lower transport costs and trade facilitation, are also important components of competitiveness and thus helps to explain future trade growth. The challenge for researchers is to identify the mutual causalities between transport costs, transport connectivity, and trade. The challenge for policy makers is to promote better and less costly transport services, which help to promote trade, which will again encourage further improvements in transport services and costs.

Future research could attempt to monitor developments over time, as these also indicate changes in the attractiveness of ports to the shipping lines. Future research could further expand the "connectivity index" to cover inland access to sea ports, including access by landlocked countries. Connectivity through other modes of transport, too, needs to be looked at. Most important for policy makers would be research and policy recommendations regarding possibilities to improve national transport connectivity. Concerning liner shipping, experience suggests that port reform, the introduction of ICTs, and of course infrastructure investment can all help to increase the number and sizes of ships that call at a country's ports and thus contribute to a country's foreign trade competitiveness.

A low "national" connectivity does not necessarily mean that a country's importers and exporters would not have access to ports and liner shipping services. Especially in Europe, the use of neighbouring countries' ports is very common. For many developing countries, however, transit transport still implies high additional costs and delays, and a low connectivity through national ports is a good indicator of the services available to national importers and exporters.

Jan Hoffmann, Trade Facilitation Section, Trade Logistics Branch, SITE, UNCTAD
jan.hoffmann@unctad.org.

Review of Maritime Transport

The Review

Around the end of the year and since 1968 UNCTAD publishes the Review of Maritime Transport. The publication summarizes annual sea transport events with emphasis in developing countries and having as a background useful shipping statistics provided by Lloyd's Register and other specialized sources.

The structure of the Review has evolved in time, with some themes being permanent such as development of the world fleet, port development and status of conventions while others are covered with varying intensity and still others, such as shipbuilding, simply dropped. Current issues of the Review are structured in seven chapters. The first one deals with the demand side of sea transport and describes major trends affecting transport of bulk cargoes such as crude oil and petroleum products, iron ore, coal, grain, bauxite/alumina and rock phosphate. Reference is also made here to minor bulks, steels, timber and the like, and liner cargo, that is containers.

The second and third chapter focus on the supply side. The evolution of the world merchant fleet is carried out here by groups of countries with annexes providing figures by country in GT and DWT. Chapter 4 summarizes freight rate levels using indices and some broad figures for liner trades as well as their impact on some selected commodities. A useful freight ratio is provided here to assess the impact of rates on the import bill for groups of countries.

Chapter 5 reviews physical and commercial events affecting port performance and development and provides an account of institutional issues such as privatisation. Chapter 6 focuses in land based transport events and development, evolution of the container market and status of the UN conventions. Every year chapter 7 focuses on shipping and transport events in developing countries located in one of the three following regions: Africa, Asia and Latin America.

The most recent issue

The *Review of Maritime Transport, 2004* focuses on events of the previous year, during which maritime trade expanded at a rate of 3.7 per cent to reach 6.2 billion tons. This result compares favourably with that reached in 2002 – only 1% increase. The expansion in seaborne trade during 2003 is mainly attributable to the economic performance observed in the US, Japan and China and to a lesser extent in Europe.

The split of the global seaborne trade is as follows: liquid dry bulks reached 2.2 billion tons after expanding at 3.4 per cent; main-dry bulks reached 1.5 billion tons following a remarkable 9.1 per cent increase; the remaining tonnage mostly dry cargo and including containerised ones and minor bulks reached 2.5 billion tons but expanded modestly at slightly less than 1 per cent. In the liner trades, container throughput in ports increased by 9.2 per cent to reach a new record of 266.3 million TEU. Container cargo shipped by developing countries moved under new US security regulations implemented along the main routes

The split of the tonnage by countries is as follows. Asian countries had the largest share of the total goods loaded reaching 37.2 per cent; the exports of crude oil from Western Asia and manufactured goods from China and other countries of East and South East Asia contributed to this result. Countries in Europe reached 25.1 per cent of world tonnage loaded with the lions' share belonging to countries of the European Union. Industrialized countries in North America and developing countries in America made up 20.7 per cent of world tonnage loaded with the latter countries accounting for about two thirds of the total tonnage for the hemisphere due to the considerable exports of crude oil, iron ore, coal and grains. The shares of countries of Africa and Oceania in the world tonnage exported were 8.9 and 8.0 per cent, respectively.

The overall share of world seaborne trade for developing countries decreased slightly in 2003. These countries accounted for 48.2 per cent of goods loaded and 29.7 per cent of goods unloaded, compared to 48.8 per cent and 30.9 per cent in 2002, respectively. Oil and other commodities constitute a large proportion of loaded goods. The share of developing countries in Asia of total goods loaded and unloaded also decreased last year, to 28.9 per cent and 20.7 per cent, respectively. For developing countries in Africa, the share of loaded seaborne goods dipped to 6.5 per cent, while unloaded goods fell to 3.2 per cent. The share of maritime trade for developing countries in America decreased modestly from previous levels, reaching 12.3 per cent for goods loaded and 5.4 per cent for goods unloaded.

Worldwide fleet expansion continued at a pace of 1.5 per cent, reaching 857.0 million dwt at the beginning of 2004. Newbuilding deliveries during the year 2003 were 49.2 million dwt (up by 0.2 million dwt from the previous year); tonnage broken up and lost, 25.6 million dwt (down from 30.5 million dwt in the previous year) leaving a net gain of 23.6 million dwt. Oil tankers and dry bulk carriers made up 72.9 per cent of the total world fleet. The container ship fleet rose by 9.3 per cent, to 90.5 million dwt or 10.6 per cent of the world fleet.

The average age of the fleet of developing countries (13.1 years) is slightly more than the world average (12.5 years). However, this average masks differences by type of vessels. The average age of both tankers and bulk carriers of developing countries is higher than the world averages. The reverse is true for containerships, which are on average 8.8 years old in contrast to the world average of 9.2 years. In the containership category, the proportion of vessels less than nine years of age is slightly above two thirds of the fleet of developing countries. General cargo vessels and all other vessels of developing countries are older than the world averages.

The operational productivity of the world fleet, measured in terms of tons of cargo carried per deadweight ton, increased to 7.2 in 2003 from 7.0 in 2002. Productivity, measured in terms of thousand ton-miles per deadweight ton, also increased to 28.7 from 27.5 of the year 2002. These results reflect increased load factors and were consistent with a decline in tonnage surplus to 10.3 million dwt or 1.2 per cent of world merchant fleet.

Registration of ships by developed market-economy countries and socialist countries of Asia accounted respectively for 26.9 per cent and 3.5 per cent of the world fleet. Open-registry countries recorded a minimal fleet expansion of 1.0 million dwt to 399.5 million dwt making up 46.6 per cent of world fleet in 2004 (47.2 per cent in the previous year). Measures to assure minimum security and environmental standards were raised in connection with the open-registry fleet often referred to as flags of convenience.

The developing countries experienced an increase in their share of the world fleet from 20.8 per cent to 21.8 per cent while in terms of absolute capacity the fleet increased by 10.1 million dwt to 181.4 million dwt at the beginning of 2004. Developing countries in Asia increased their deadweight tonnage to 136.0 million at the beginning of 2004 from 126.9 million at the previous year. Developing countries in Asia now account for 17.4% of world tonnage or 75.0 per cent of the fleet of all developing countries. African developing countries, by contrast, maintained their 0.7 per cent of world tonnage (3.1 per cent of all developing country tonnage).

The last chapter of the issue focused in developing countries of Asia for which:

- Trade growth in 2003 has been positive for the large majority of Asian countries. The highest growth rates of exports were registered for Kuwait (+40%), Lebanon (+39%), China (+35%), Kazakhstan (+33%) and Yemen (+ 26%). The highest growth rates for imports were observed in Azerbaijan (+58%), China (+40%), Qatar (+30%), Kazakhstan (+27%) and Viet Nam (+26%).
- Asian countries are significant world players in many sectors of maritime transport. They account for about half of the crews, two thirds of global port operators, 83% of container ship building and 99% of demolition. Twenty-eight of the world's 50 largest liner-shipping companies are based in Asia.
- Containerized trade of South and East Asian countries is forecasted to expand at an annual rate of 11% in 2004 and 2005, fuelled by strong intra-Asian trade, as well as Chinese exports to North America and Europe.
- Container Transshipment through existing and also new hub ports in Asia has continued to expand. In 2003, the world's six largest container ports, and 20 of the world's top 30, were located in Asia. In particular, ports in China have registered record growth rates in 2003. The ports of Shanghai and Shenzhen grew by 31% and 40% respectively.

Evolution of the fleet under open registries

One of the most salient features of merchant shipping over the last decades is the expansion of the fleet under open registries. In the Review this term is used to denote a registry for which nationals account for a very small or negligible share of the total tonnage under registry. The following table extracted form several issues of the Review highlights their growing importance over the years.

Table 11: World and Open-Registry Fleets

Date	World Fleet million DWT	Open-registry countries fleet; million DWT	Percentage share of open-registry countries fleet
1 July 1970	326.1	70.3	21.6
1 July 1980	682.8	212.6	31.1
1 July 1990	658.4	224.6	31.1
1 January 2000	799.0	384.7	48.1
1 January 2003	844.2	398.5	47.2
1 January 2004	857.0	399.5	46.6

Note: Ships over 100 grt

Open-registry have evolved during the years. In 1970 Panama, Liberia, Cyprus, Singapore and Somalia were included under this heading. In 1990, the last two countries were dropped and replaced by the Bahamas and Bermuda. Nowadays, the Review reports about six major open-registry – Panama, Liberia, Bahamas, Malta, Cyprus and Bermuda – and six minor ones – St. Vincent and Grenadines, Antigua and Barbuda, Cayman Islands, Luxemburg, Vanuatu and Gibraltar.

The Review also reports on international registries that is those in which the participation of nationals of the country or nationals of countries having a privileged relationship with the country of registry makeup a substantial share. Sometimes these are called second-registries. The international registries are Singapore, Norwegian International Ship Registry, Hong Kong (China), Marshall Islands, Danish International Ship Registry, French Antarctic Territory and Netherlands Antilles.

Carlos Cañamero, Transport Section, Trade Logistics Branch, SITE, UNCTAD
carlos.canamero@unctad.org

Fleet Statistics

Selected fleet statistics from past issues of the Review of Maritime Transport are now available on-line. Readers first need to register, and are then in a position to visit "Public Reports"/ "Handbook of Statistics" / "VIII Special Studies" / "8.6 World Merchant Fleet". By clicking on a specific region, lists of subregions and individual countries will appear. Country-by-country tables provide the tonnage of nationally flagged vessels for the years 1990, 2000 and 2003 by main vessel types.

To register please visit http://stats.unctad.org/restricted/eng/ReportFolders/Rfview/Explorerp.asp
For questions or to request assistance, please contact Carlos Cañamero at carlos.canamero@unctad.org or Jan Hoffmann at jan.hoffmann@unctad.org.

Port and Transport Newsletters

UNCTAD's now quarterly "Transport Newsletter" is the successor of UNCTAD's annual "Ports Newsletter", which used to be distributed in printed format only. The issues of the annual Port and Transport Newsletter between November 1995 and today have now also been made available in electronic format. Selected articles of previous issues include:

- Institutional Restructuring of Ports (Issue # 14, November 1995).[9]
- Survey of Port Management Training Needs (# 15, May 1996).[10]
- Rehabilitation Programme for Somali Ports (# 16, November 1996).[11]
- The Use of ICTs in Transit (# 17, November 1997).[12]
- The Advance Cargo Information System (# 18, November 1998).[13]
- Fourth Generation Port (# 19, November 1999).[14]
- Transport in the Horn of Africa (# 20, November 2000).[15]
- Evolution of containerized traffic in African ports (#21, November 2001).[16]
- Electronic Commerce and International Transport Services (# 22, February 2003).[17]
- Transport Documents in International Trade (# 23, March 2004).[18]
- Recent Trends in Liner Shipping Freight Rates (# 24, June 2004).[19]
- Concentration in Shipping and the Specialization of Countries (# 25, September 2004).[20]
- Transit Transport Arrangements (# 26, December 2004).[21]

jan.hoffmann@unctad.org
For the list of past Port and Transport Newsletters, see http://r0.unctad.org/ttl/ttl-newsltrs.htm

[9] http://r0.unctad.org/ttl/docs-trnews/Ports%20Newsletter%20No%2014.pdf
[10] http://r0.unctad.org/ttl/docs-trnews/Ports%20Newsletter%20No%2015.pdf
[11] http://r0.unctad.org/ttl/docs-trnews/Ports%20Newsletter%20No%2016.pdf
[12] http://r0.unctad.org/ttl/docs-trnews/Ports%20Newsletter%20No%2017.pdf
[13] http://r0.unctad.org/ttl/docs-trnews/Ports%20Newsletter%20No%2018.pdf
[14] http://www.unctad.org/en/docs/posdtetibm15.en.pdf
[15] http://r0.unctad.org/ttl/docs-trnews/posdtetibm17_en.pdf
[16] http://www.unctad.org/en/docs/posdtetlbm2.en.pdf
[17] http://www.unctad.org/en/docs/webtlog20031_en.pdf
[18] http://www.unctad.org/en/docs/websdtetlb20041_en.pdf
[19] http://www.unctad.org/en/docs/websdtetlb20042_en.pdf
[20] http://www.unctad.org/en/docs/websdtetlb20043_en.pdf
[21] http://www.unctad.org/en/docs//websdtetlb20046_en.pdf

The Establishment and Operation of an Electronic Single Window: Case Study of Guatemala

A Single Window is a facility that allows parties involved in trade and transport to lodge standardized information and documents with a single entry point to fulfil all import, export, and transit-related regulatory requirements. Guatemala introduced a first Single Window for export procedures in 1986. This first initiative led to a reduction of the time to process and issue an export licence from 10–12 days to 6–8 days. In 2000, a pilot of an electronic and more advanced version of the Single Window was successfully launched. By 2003, the new system covered companies accounting for 65 per cent of all export transactions and an export licence can now be obtained within a few minutes. Other advantages of the new system include a reduction of costs, the possibility to obtain licences outside office hours, a cutback in the number of required documents, and increased transparency and predictability. The successful implementation of the Single Window depended heavily on four key factors, i.e. 1) political will and commitment from government and business, 2) a strong and resourceful lead agency, 3) the establishment of the required legal framework, and 4) financial support for the necessary investment in technology and capacity building.

This document is based on a survey carried out within the UNCTAD technical assistance project "Trade Facilitation in the context of the Doha Development Agenda: Support to trade facilitation platforms in developing countries". It has benefited from valuable inputs provided by Ms. Sonia Albarello, National Board of Trade, Sweden.

To download the document, visit http://www.unctad.org/en/docs/sdtetlbmisc20045_en.pdf
For further information, contact maxence.orthlieb@unctad.org or jan.hoffmann@unctad.org.

Recent Increases in Shipping Costs and their Impact on Exports from Latin America

Following previous studies performed by ECLAC and UNCTAD,[22] this new study by ECLAC works out a provisional approach for estimating the impact of increases in freight rates on exports from Latin America during the last few quarters.

The total cost of exports from the region reflects the increases in three different components: the quantities exported, the prices of the goods and the freight charges. The influence of each of these is estimated. Regarding the increased freight charges, the study makes an hypothesis related to the convergence of two elements that have resulted in a generalized rise in freight rates and a scarcity in services in some regions. These elements are: (a) a significant imbalance between the demand for, and supply of, maritime transport services; (b) a rise in critical costs, such as insurance, fuel, time charters and the purchase prices of new and used ships.

The data used was obtained from the World Trade Organization (WTO), the United Nations Conference on Trade and Development (UNCTAD), the Economic Commission for Latin

[22] "Recent Trends in Liner Shipping Freight Rates" in UNCTAD Transport Newsletter No. 24, 2nd Quarter 2004: http://www.unctad.org/en/docs/websdtetlb20042_en.pdf.
Sánchez, Ricardo J. "Ocean freight, shipbuilding costs and charter rates: recent trends", in FAL Bulletin No. 213: www.eclac.cl/Transporte/noticias/bolfall/2/19432/FAL213E.htm
Sánchez, Ricardo J. "Puertos y transporte marítimo en América Latina: un análisis de su desempeño reciente", Recursos Naturales e Infraestructura Series No. 82, ECLAC, Santiago de Chile: http://www.eclac.cl/publicaciones/RecursosNaturales/7/LCL2227PE/lcl2227e.pdf.
Hoffmann, Jan: "The Cost of International Transport, and the Integration and Competitiveness of Latin America and the Caribbean", in FAL Bulletin No. 191, http://www.eclac.cl/Transporte/noticias/bolfall/2/11072/FAL191e.htm

America and the Caribbean (ECLAC) (International Transport Database - BTI) and the authors' own direct compilation. The conclusion is that total exports from Latin America increased by US$ 5.72 billion in the first half of 2004 compared with the first half of 2003; of this amount, US$ 2.11 billion correspond to the variation in price and quantity and US$ 3.6 billion represent the increase in export freight rates. When compared with the first half of 2002, the variation is in excess of US$ 8 billion.

Ricardo J. Sánchez: Ricardo.Sanchez@cepal.org and José Durán Lima Jose.Duran@cepal.org
For further information see www.eclac.cl/Transporte/noticias/bolfall/9/20829/FAL221.htm

Shipping Economics: Research in Transport Economics, Volume 12

This book is concerned with the economics of the maritime mode of transportation. The various chapters in the book represent areas that are of central concern to ongoing research in the field. As such, the book is useful to students, researchers, industrialists, policy makers and consultants. The authors of the contributed chapters address a number of diverse areas: The econometric modeling of shipping markets; Shipping finance (a critical issue in such a capital intensive industry); Fiscal policy (and its impact on an international industry with great asset mobility) and safety and security (aspects that have risen to prominence with increasing concerns over the environment and international terrorism). Ultimately, while shipping as a business depends upon trade, it is absolutely certain that the business of trade depends upon shipping. The final two chapters, therefore, incorporate aspects of network economics, welfare economics and international trade theory to analyze where and how shipping sits within the wider perspective of industrial supply chains.

For further information visit http://www.elsevier.com/locate/series/rte .
Kevin Cullinane, Chair in Marine Transport and Management, School of Marine Science and Technology, University of Newcastle, United Kingdom, Kevin.Cullinane@ncl.ac.uk

FIATA

Founded in 1926, the International Federation of Freight Forwarders Associations (FIATA) represents approximately 40,000 forwarding firms in 150 countries. As the global voice of freight logistics, FIATA aims to facilitate and accelerate the growth of the forwarding industry worldwide. It is one of the largest transport-related NGOs in the world and currently holds consultative status with UNCTAD, ECOSOC, UNECE, and UNESCAP. Our constituents are known as the architects of transport, the lynchpins in worldwide supply chains. In fact, in the new global economy, the services provided by freight forwarders are key to keeping supply chains in motion.

FIATA has created several trade documents and forms to encourage uniform standards for the industry. We promote cooperation between national member associations, the training of freight forwarders, evolution within the industry, and value addition by freight forwarders. Overall, FIATA's goal is to help freight forwarders navigate the many challenges of a rapidly evolving profession, including new cargo security regulations that have come into effect since 9/11.

No aspect of the freight forwarder's work remains untouched by the issue of security. The central question being addressed by lawmakers all over the world is whether trade facilitation and security regulations are compatible. No matter how complicated the answer to that question, it is clear that security is a fact of life in this industry. All supply chain players must adjust their mindsets to this new reality, and forwarders are no exception. FIATA is encouraging its members to take advantage of new technological tools in their quest to ensure

the security of the supply chain. We must embrace these tools and create a culture of security throughout the chain, or else wither away—this is our new challenge.

The technical work of FIATA is carried out by its Institutes and Advisory Bodies, which participate in and advise various governmental and non-governmental organizations. The Air Freight Institute works closely with IATA and similar organizations to face the challenge of new air cargo security regulations, as well as various issues relating to aviation agreements. In the midst of turbulent times for the aviation industry, FIATA contributes the logistician's viewpoint to the many discussions taking place and the many regulations being refined. FIATA's Multimodal Transport Institute, which is comprised of sea, rail, and road transport working groups, carries out ongoing initiatives related to road transport, dangerous goods regulations, and maritime policies and agreements, among other issues.

In the past few years, FIATA has increased its effectiveness by implementing a regionalization strategy. With four groups around the globe (the Americas, Europe, Africa-Middle East, and Asia), FIATA members can share needs, experiences, and best practices on a regional level. These smaller, more focused groups meet at least twice per year and have seen great success. The Young International Freight Forwarder of the Year Award has also been regionalized, and this year at the FIATA World Congress in Moscow we look forward to welcoming one winner from each of the four regions.

Encouraging young freight forwarders through training and professional development is a major part of FIATA's work. Independent forwarders today must deal with the myriad challenges that accompany globalization: changing conventions, new security regulations, competition from multinational giants, and bottlenecks in the logistics chain caused by age-old problems like congested ports and red tape. FIATA's goal is to enhance their technical know-how and to ensure that they are operating according to international standards. Thanks to the assistance of FIATA's Foundation for Vocational Training, this type of professional skill enhancement can take place even in poorer countries with national associations who might not otherwise have the necessary funds at hand. FIATA's national associations have taken advantage of this resource, with recent training programs being conducted under FIATA's guidance in Kenya and Mongolia.

But training is only one aspect of a new chapter for FIATA which we call the FIATA of Tomorrow. We have identified the need to create a new arbitration body, which will provide a much-needed vehicle for dispute resolution among members. FIATA is also working toward increased membership, a higher profile for its annual World Congresses, further communication between members and the leadership, and new academic initiatives such as research and benchmarking projects. Finally, FIATA is putting a new focus on marketing and raising global awareness of the organization. A new marketing plan, currently in progress, will help FIATA refine its vision and refocus on what it stands for, helping it to truly become the global voice of freight logistics.

Issa Baluch, President, International Federation of Freight Forwarders Associations (FIATA).
Contact via info@fiata.com, www.fiata.com.

GFP – Featured Topic "Transit"

As in previous issues of the Transport Newsletter, we include information about the "featured topic" of the Global Facilitation Partnership (GFP).

Transit refers to movement of goods through Customs control from one Customs office to the other without paying import duties, domestic consumption taxes or other charges normally due

on imports. This movement is subject to laws and regulations of the transit country and also bilateral or international agreements.

Transit frequently refers to road transportation to and from landlocked countries. In fact, it can be national and international: National transit happens when goods are transferred within national borders, from the first point of entry in the country to a location where customs procedures are undertaken (e.g. dry ports). International transit refers to the procedure where national borders are crossed. In many landlocked developing countries both types of transit can be found: imported goods arrive at the national borders from the transit countries, and are most often shipped under national transit to the main economic centres. The basic Customs mechanisms are similar in both cases; however, the implementation is easier for the national transit link.

For developing countries, the most important case of transit is road/rail transportation to and from landlocked developing countries (LLDCs), most of which rely heavily on international maritime transport for their trading activities. Many international organizations and transportation fora have identified dysfunctional transit operations as a major cost increasing factor for LLDCs. These issues need to be addressed systematically to help LLDCs reach out to global markets. Those issues and a remedial action plan have been discussed extensively in the International Ministerial Conference of Landlocked and Transit Developing Countries and Donor Countries and International Financial and Development Institutions on Transit Transport Cooperation held at Almaty, Kazakhstan, from 28 to 29 August 2003. The Conference adopted the Almaty Programme of Action (APoA): Addressing the Special Needs of Landlocked Developing Countries within the New Global Framework for Transit Cooperation for Landlocked and Transit Developing Countries, and the Almaty Declaration.

Transit procedures need to protect the revenues of the country of transit and to avoid the circumstance that goods intended for transit are introduced to the domestic market. Such transit procedures should be simple so as not to generate excessive delays and costs.

Core ingredients for a smooth transit include:

- adequate guarantee system
- effective customs control (seals) and enforcement
- efficient documentation flow (documentation)
- enabling bilateral and international agreements
- infrastructure and corridor institutions

The GFP Topic Manger for this item is Jean-Francois Arvis, World Bank, Jarvis1@worldbank.org
For further information about this topic visit www.gfptt.org/topics/transit

Multimodal Transport Course (in French)

UNCTAD has prepared pedagogic material for a Course on Multimodal Transport and Logistics, in French (Transport Multimodal et Logistique). The elements to give the course include an instructor's guide, PowerPoint Presentation files, case studies, and an evaluation test, and are available on a CD-Rom. A summary has been published in December 2004, under UNCTAD/SDTE/TLB/MISC/2004/4.

For the summary of the course, visit http://www.unctad.org/fr/docs/sdtetlbmisc20044_fr.pdf .
To request the CD-Rom, contact trade.logistics@unctad.org

Upcoming events

Public Private Partnerships in Ports

Antwerp, 25–29 April 2005. In the past decade, the port business environment has changed significantly. External forces of competition and technology from the shipping and logistics industry have pushed governments and ports to adopt modern service-oriented organizational structures, based on a new division of powers, responsibilities and functions. These new institutional arrangements, although different from port to port because of a different political and economic context, are referred to as Public-Private-Partnerships in ports. This generic term refers to fundamental and irreversible changes, both on the managerial, the operational and the financial level and has triggered the introduction of new approaches, techniques and contract arrangements.

For more information visit http://143.129.203.3/itmma/artman/publish/article_325.shtml
Willy Winkelmans, ITMMA, willy.winkelmans@ua.ac.be

Indian Ocean Ports Logistics and Shipping Conference

Mauritius, 28–29 June 2005. Hosted by Mauritius Ports Authority and to be officiated by the Honourable Prime Minister of the Republic of Mauritius, Mr. P. R. Berenger CGSK. The event takes place in conjunction with the 31st Council Meeting of the Port Management Association of Eastern and Southern Africa. The conference will feature speakers in global transport and logistics. Topics will focus on global as well as regional Indian Ocean developments. The Conference will be conducted in English and French. African Nationals are entitled to a reduced conference registration fee.

For further information visit www.transportevents.com/event_page.cfm?event_content_id=164
Rory J. Doyle, rory@transportevents.com

IAME 2006 in Melbourne

The 2006 annual meeting of the International Association of Maritime Economists (IAME) is to take place in Melbourne, Australia, on 15–18 November 2006.

For further information about IAME and its conferences visit www.iame.info
Sophia Everett, Melbourne University Private, s.everett@muprivate.edu.au and Ross Robinson r.robinson@muprivate.edu.au

International Congress on Coastal and Marine Tourism

The International Congress on Coastal and Marine Tourism-CMT Cesme 2005 will be held in Cesme-Izmir during 15–18 November 2005 as a result of the cooperation reached by Dokuz Eylül University Faculty of Business, Dokuz Eylül University School of Maritime Business and Management (Turkey) and Oregon State University (USA). The main purpose of this congress is to create an environment for discussions and exchanging views on exploring the challenges of managing coastal and marine resources and developing tourism in the coastal zone in a sustainable way.

For further information visithttp://www.deu.edu.tr/maritime/CMT2005.htm
A. Guldem Cerit, Dokuz Eylul University, gcerit@tnn.net