Multi-year Expert Meeting on Transport, Trade Logistics and Trade Facilitation
Sustainable Freight Transport Systems: Opportunities for Developing Countries
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REVIEW OF MARITIME TRANSPORT 2015

by

Mr. Jan Hoffmann
Chief, Trade Facilitation Section
Trade Logistics Branch, Division on Technology and Logistics
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The year 2015 is a milestone for sustainable development. The international community has a unique opportunity to strengthen its commitment to sustainable development and consider how best to mainstream sustainability principles across all economic activities and sectors, including maritime transport. In this context, relevant chapters of the present edition of the *Review of Maritime Transport* highlight some issues that are at the interface of maritime transport and sustainability and underscore the role of maritime transport in helping implement a workable international sustainable development agenda.
Seaborne Trade
SEABORNE TRADE

World merchandise trade
grew 2.3%. This is down from 2.6% in 2013
and below the pre-crisis levels

Global seaborne shipments
have increased 3.4%, at the same rate than in 2013

Additions to volumes exceeded 300 million
tons taking the total to 9.84 billion tons

Developing countries share of
global imports measured by
volume of unloaded goods reach
61% 3.5 times more
than in 1970

This performance unfolded in the context of a number of
developments including:
- a slowdown in large emerging developing economies
- lower oil price levels and new refinery capacity developments
- a slow-moving and uneven recovery in the advanced economies
Share of developing countries in seaborne trade, volume (tons)

- Goods loaded
- Goods unloaded
THE FLEET

World fleet grew by 3.5% - The lowest annual growth rate in over a decade

World commercial fleet consisted of 89,464 vessels

1.75 Total tonnage of billion dwt

The average age of the world fleet increased slightly

Top 5 largest ship-owning countries:
- Greece
- Japan
- China
- Germany
- Singapore

Together, these countries control more than half of the world tonnage.
Environmental aspects

Figure 2.5. Share of newbuildings (number of ships) with ballast water treatment systems, by main vessel type, 2007–2014

Source: UNCTAD secretariat, based on data supplied by Clarksons Research.
Note: Propelled seagoing merchant vessels of 1,000 GT and above.
Container ship deployment
Freight costs
How much do countries pay for the transport of their imports?

International transport costs as per cent of value of imports, all modes of transport, regional averages

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<tbody>
<tr>
<td>Africa (developing)</td>
<td>12.4</td>
<td>11.7</td>
<td>11.4</td>
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<tr>
<td>Oceania (developing)</td>
<td>11.9</td>
<td>9.9</td>
<td>9.6</td>
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<tr>
<td>Asia (developing)</td>
<td>8.8</td>
<td>9.2</td>
<td>9.0</td>
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<td>America (developing)</td>
<td>11.0</td>
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<td>8.0</td>
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<tr>
<td>Developed economies</td>
<td>9.5</td>
<td>7.2</td>
<td>6.8</td>
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**FREIGHT COSTS**

Developing countries pay 40 to 70% more for the international transport of their imports than developed countries.

Container and tanker freight rates remained volatile throughout 2014

The dry bulk market freight rates faced another challenging year influenced by the surplus capacity that still exists and the uncertainties in demand projections.

Bulk carrier earnings fell 5% from 2013 to reach an average of $9,881/day
Ports
PORTS

Developing economies’ share of world container port throughput increased to 71.9%. This continues the trend for a gradual rise in developing countries' share of world container throughput.

DID YOU KNOW? The world largest terminal operator handled 65.4 million TEU in 2014, an increase of 5.5% over the previous year.
# Economic, Environmental and Social Challenges Facing Ports

<table>
<thead>
<tr>
<th>Economic Challenges</th>
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<tr>
<td>Growing and concentrated traffic volumes brought about by ever increasing ships size</td>
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<td>The cost of adaptation of port and port hinterland infrastructure measures</td>
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<td>A changing market place as a result of increased alliances between shipping lines</td>
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<td>National budget constraints limiting the possibilities of public funding for transport infrastructure</td>
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<td>Volatility in energy prices, the new energy landscape and the transition to alternative fuels</td>
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<td>Entry into force of the stricter sulphur limits in (e.g. IMO Emission Control Area countries)</td>
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<td>An increasing societal and environmental pressure</td>
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<td>Potential changes in shipping routes from new or enlarged or new international passage ways</td>
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Legal and regulatory framework
LEGAL AND REGULATORY FRAMEWORK

Adoption of the International Code for Ships Operating in Polar Waters (Polar Code), expected to enter into force on 1 January 2017

To further strengthen the legal framework relating to ship-source air pollution and the reduction of GHG emissions from international shipping, several regulatory measures were adopted at the IMO, and the third IMO GHG Study 2014 was finalized.

Guidelines for the development of the Inventory of Hazardous Materials required under the 2010 HNS Convention - which, however, is not yet in force - were adopted, and further progress was made on technical matters related to ballast water management, ship recycling, and measures to help prevent and combat ship-source pollution from oil and other harmful substances.

Issuance of a new version of the WCO SAFE Framework.