

Multi-year Expert Meeting on Transport, Trade Logistics and Trade Facilitation

Sustainable Freight Transport Systems: Opportunities for Developing Countries

14-16 October 2015

REVIEW OF MARITIME TRANSPORT 2015

by

Mr. Jan Hoffmann

Chief, Trade Facilitation Section

Trade Logistics Branch, Division on Technology and Logistics
United Nations Conference on Trade and Development (UNCTAD)

16 October 2015

This expert paper is reproduced by the UNCTAD secretariat in the form and language in which it has been received.
The views expressed are those of the author and do not necessarily reflect the view of the United Nations.

<http://unctad.org/RMT>

<http://stats.unctad.org/maritime>

For further information on UNCTAD's work
on trade logistics,
please visit: <http://unctad.org/tti>
and for the *Review of Maritime Transport 2015*:
<http://unctad.org/rmt>

E-mail:
rmt@unctad.org

To read more and to subscribe to the
UNCTAD Transport Newsletter, please visit:
<http://unctad.org/transportnews>

REVIEW OF MARITIME TRANSPORT 2015

REVIEW OF MARITIME TRANSPORT

2015



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



2.3%

World merchandise trade

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

3.4%

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



This performance unfolded in the context of a number of developments including:

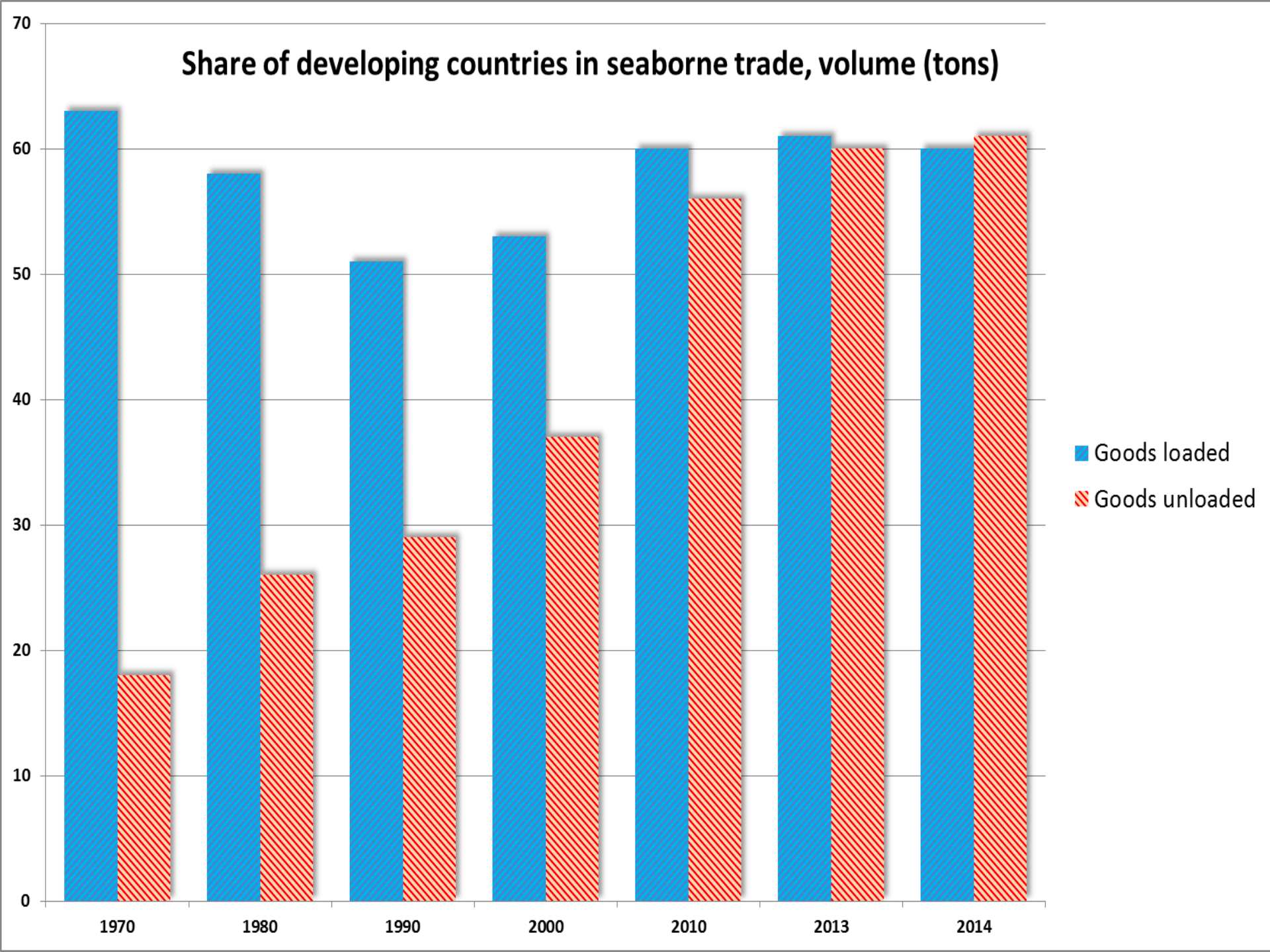
- a slowdown in large emerging developing economies
- lower oil price levels and new refinery capacity developments
- a slow-moving and uneven recovery in the advanced economies

Developing countries share of global imports measured by volume of unloaded goods reach

61%

3.5 times more than in 1970

Share of developing countries in seaborne trade, volume (tons)



The Fleet





THE FLEET



World fleet grew by **3.5%**

The lowest annual growth rate in over a decade

World commercial fleet

consisted of
vessels

89,464



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

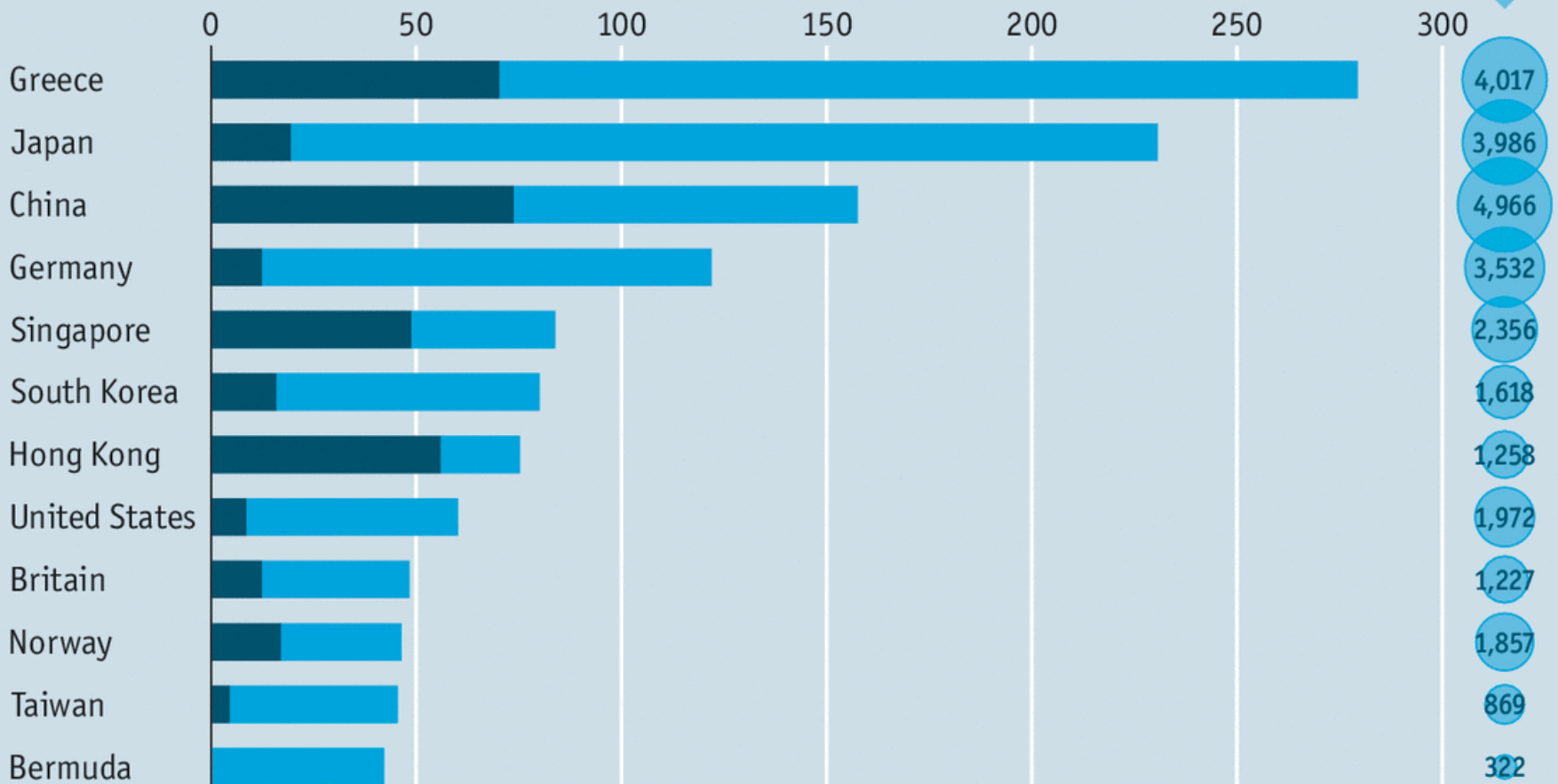
In today's *The Economist*

Merchant fleets

January 1st 2015, deadweight tonnes m

■ National flag

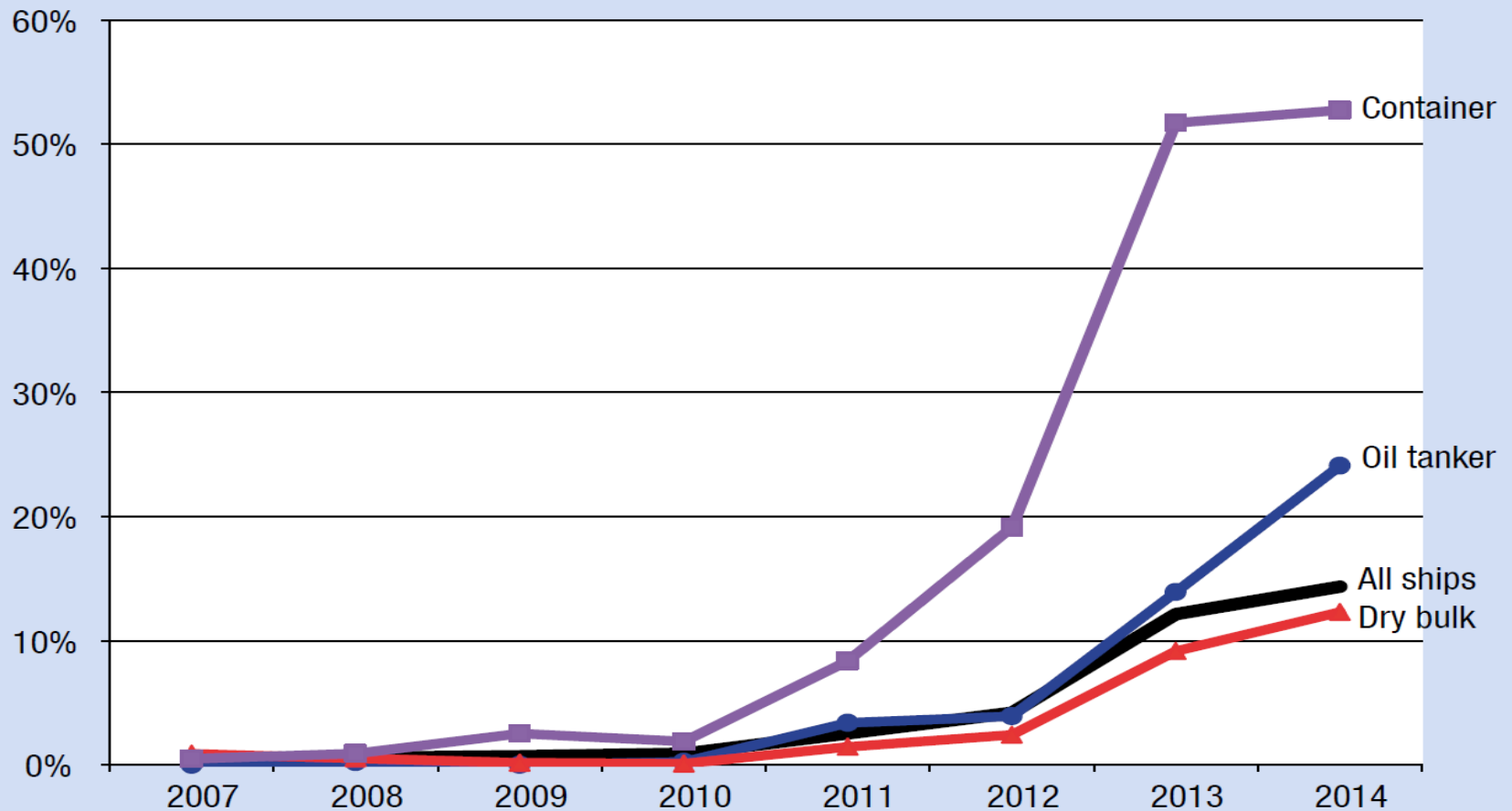
■ Foreign flag



Source: UNCTAD

Environmental aspects

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



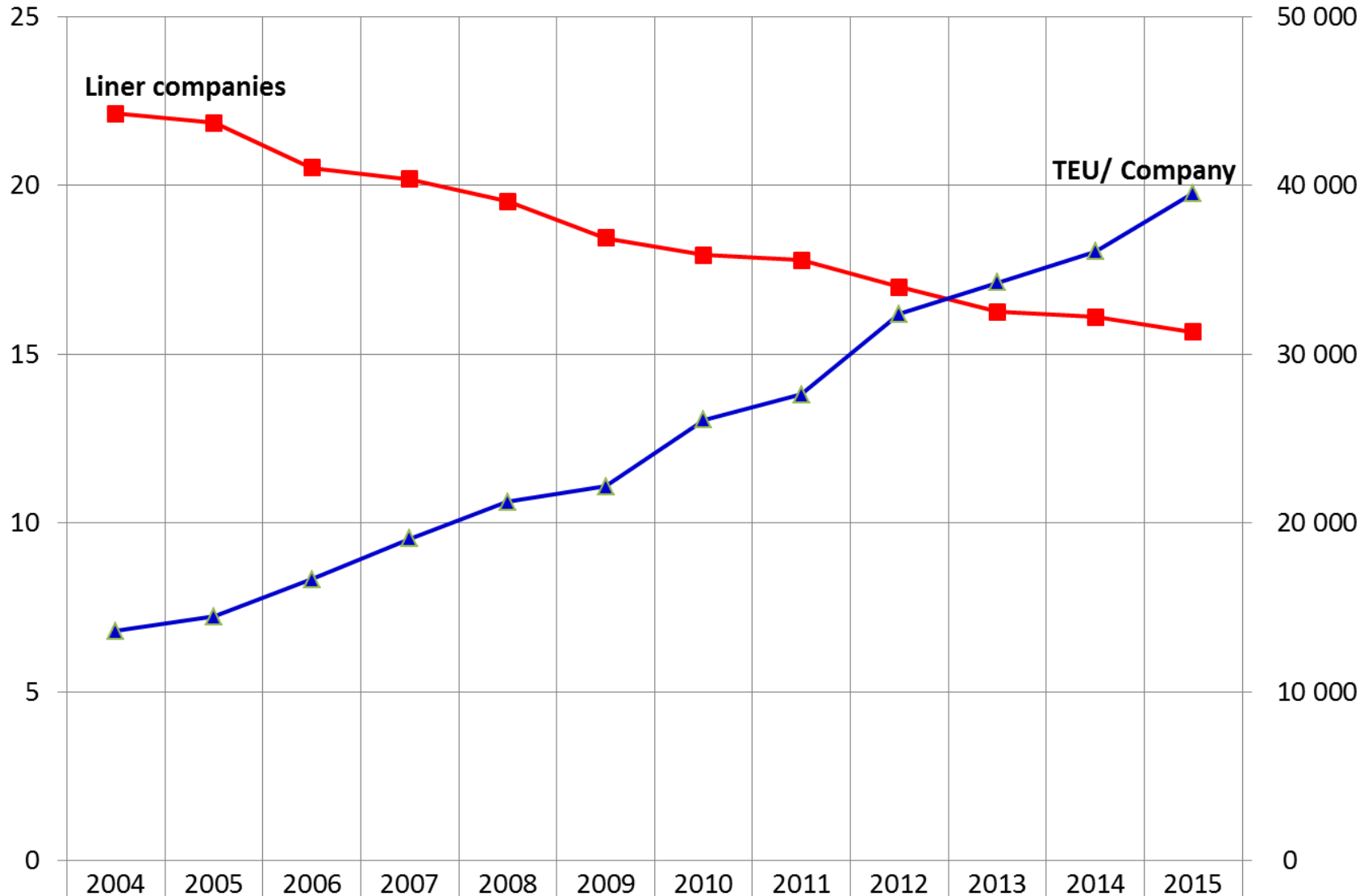
Source: UNCTAD secretariat, based on data supplied by Clarksons Research.

Note: Propelled seagoing merchant vessels of 1,000 GT and above.

Container ship deployment



Concentration in container shipping

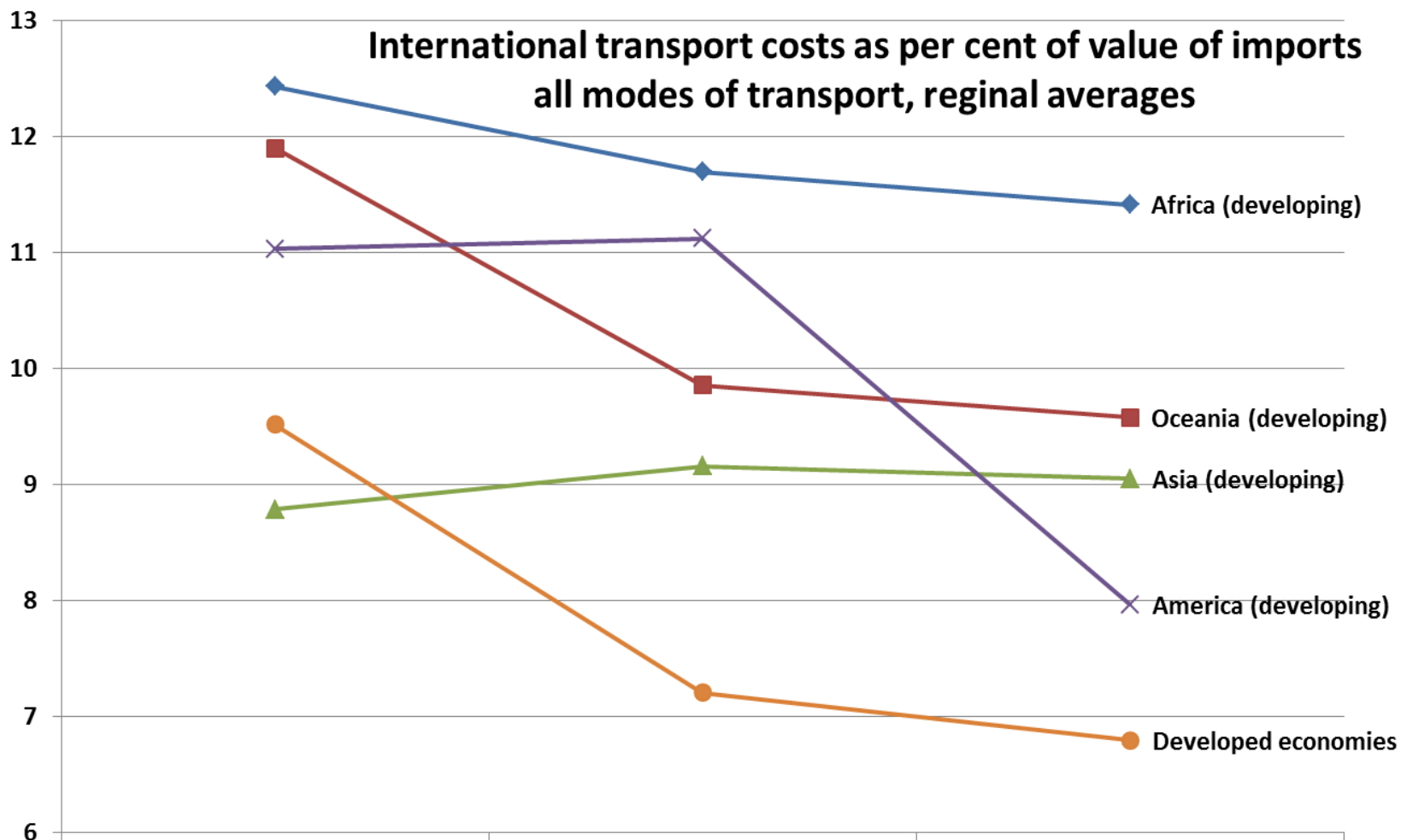


Liner companies	22.1	21.8	20.5	20.2	19.5	18.4	17.9	17.8	17.0	16.3	16.1	15.7
TEU/ Company	13 625	14 471	16 675	19 080	21 246	22 182	26 111	27 628	32 387	34 261	36 072	39 530

Freight costs



How much do countries pay for the transport of their imports?



	1985-1994	1995-2004	2005-2014
Africa (developing)	12.4	11.7	11.4
Oceania (developing)	11.9	9.9	9.6
Asia (developing)	8.8	9.2	9.0
America (developing)	11.0	11.1	8.0
Developed economies	9.5	7.2	6.8

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

Growing and concentrated traffic volumes brought about by ever increasing ships size

The cost of adaptation of port and port hinterland infrastructure measures

A changing market place as a result of increased alliances between shipping lines

National budget constraints limiting the possibilities of public funding for transport infrastructure

Volatility in energy prices, the new energy landscape and the transition to alternative fuels

Entry into force of the stricter sulphur limits in (e.g. IMO Emission Control Area countries)

An increasing societal and environmental pressure

Potential changes in shipping routes from new or enlarged or new international passage ways

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

<http://unctad.org/RMT>

<http://stats.unctad.org/maritime>

For further information on UNCTAD's work
on trade logistics,
please visit: <http://unctad.org/tti>
and for the *Review of Maritime Transport 2015*:
<http://unctad.org/rmt>

E-mail:
rmt@unctad.org

To read more and to subscribe to the
UNCTAD Transport Newsletter, please visit:
<http://unctad.org/transportnews>

REVIEW OF MARITIME TRANSPORT 2015

REVIEW OF MARITIME TRANSPORT

2015

