



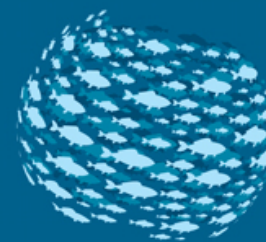
The role of maritime connectivity and logistics services for the seafood value chain



Jan.Hoffmann@UNCTAD.org

UNITED NATIONS CONFERENCE ON TRADE AND DEVELOPMENT

UNCTAD



16-17
JULY 2018

Palais des Nations,
Room XXVI

2nd OCEANS FORUM ON
TRADE-RELATED
ASPECTS OF
SUSTAINABLE
DEVELOPMENT
GOAL 14



- ▶ Maritime Transport Trends
- ▶ Fish and Ships
- ▶ Nets and Networks





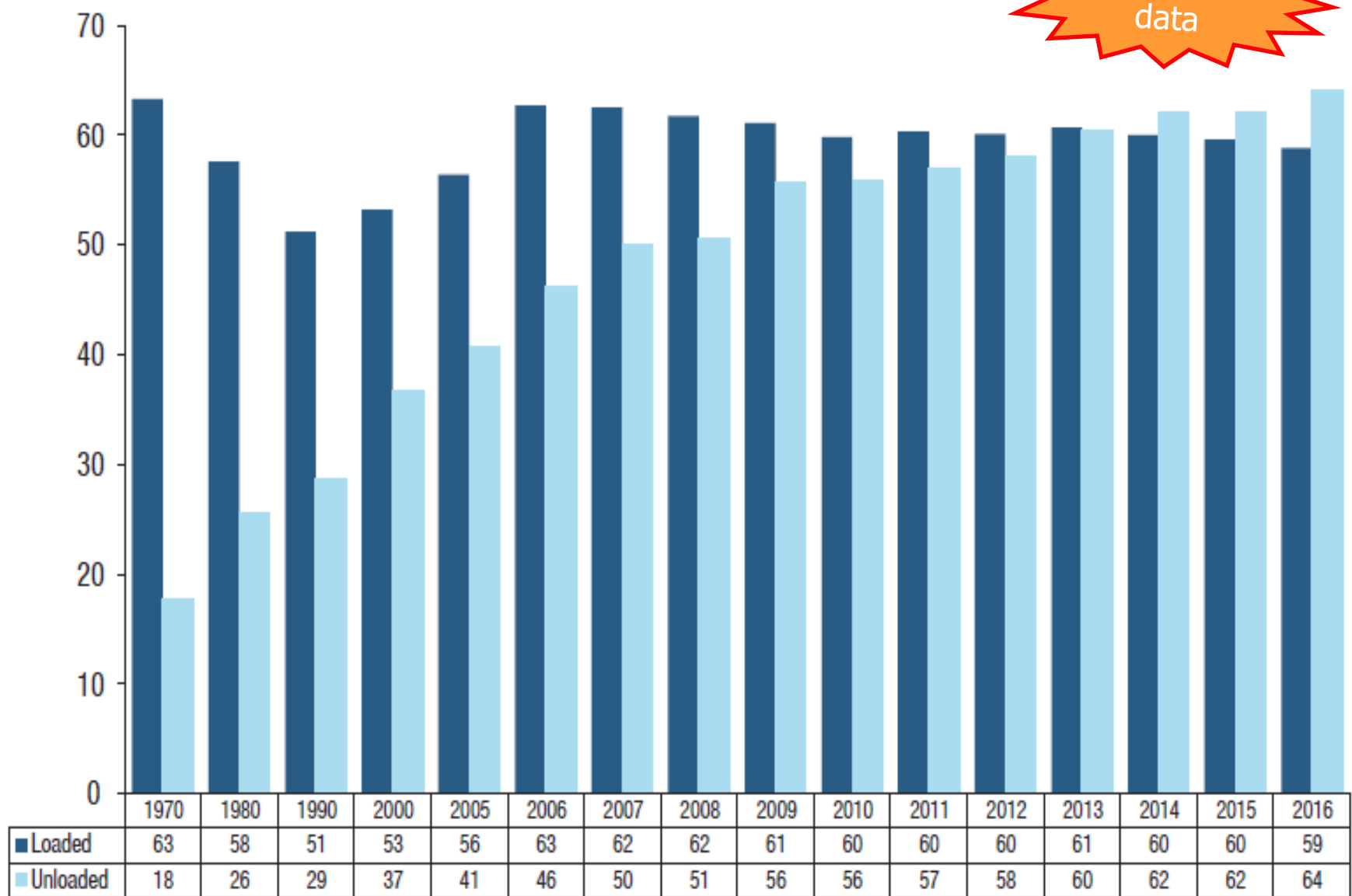
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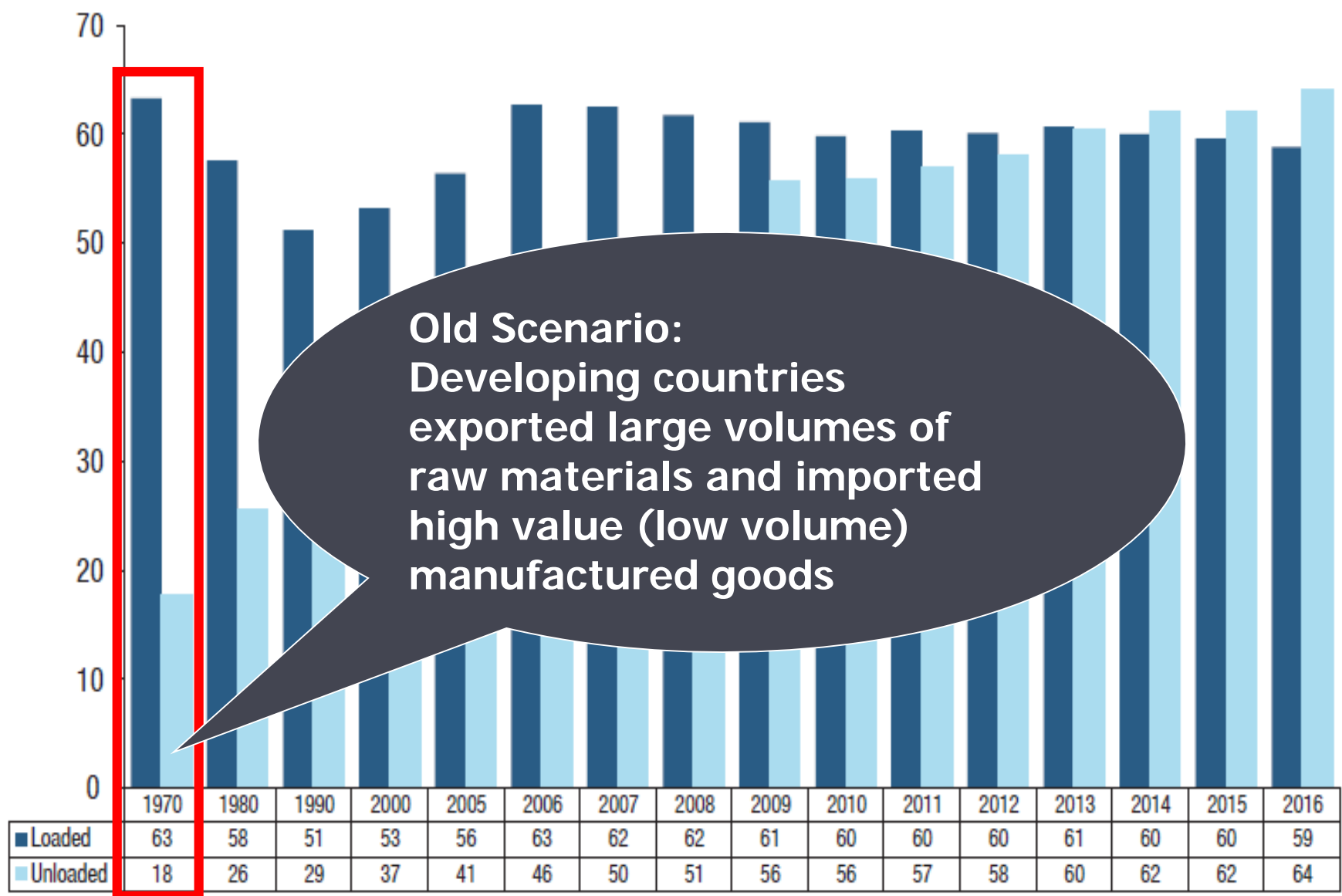
**Figure 1.4 (b). Participation of developing economies in world seaborne trade, selected years
(Percentage share in world tonnage)**

UNCTAD
data



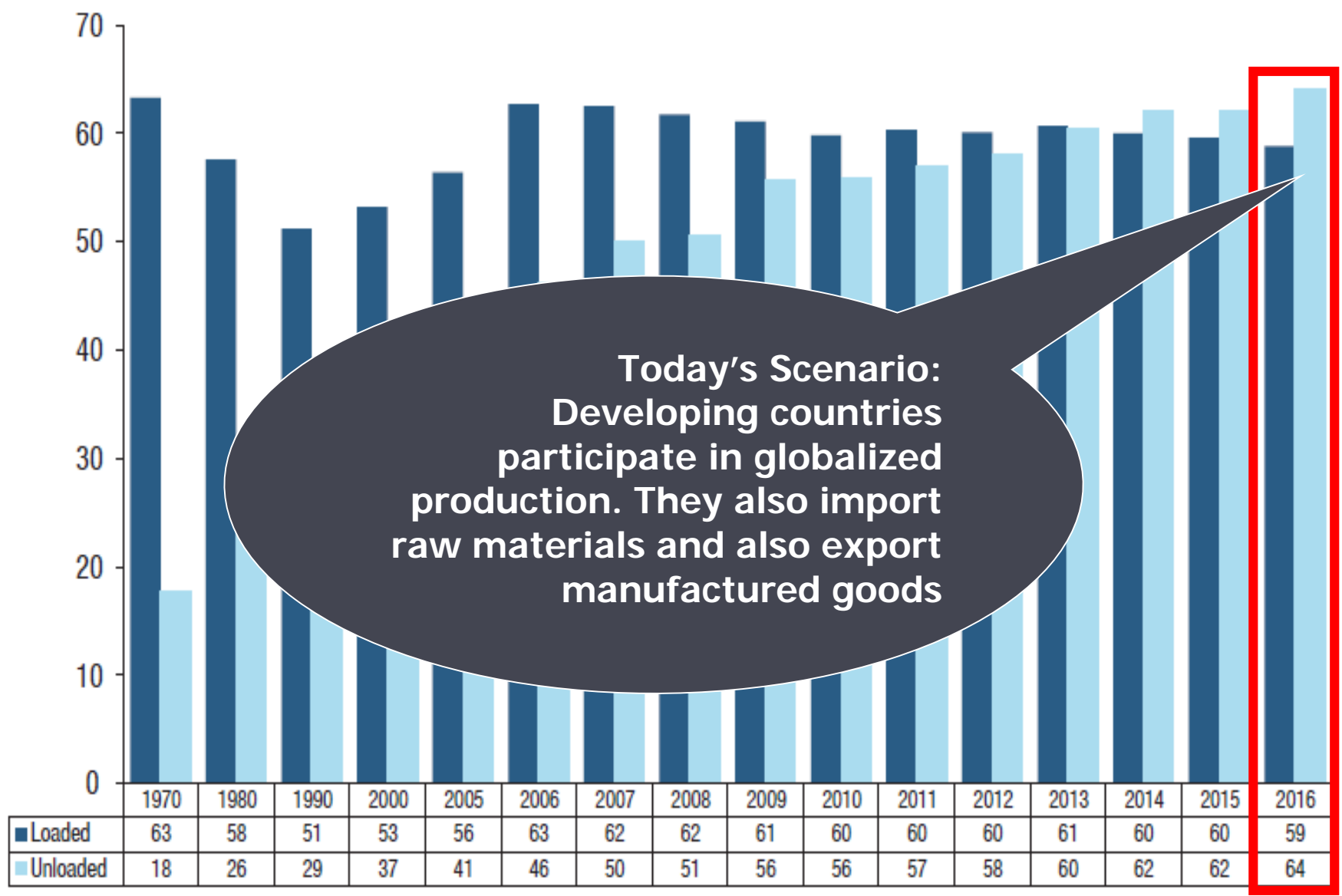
Source: Review of Maritime Transport, various issues.

**Figure 1.4 (b). Participation of developing economies in world seaborne trade, selected years
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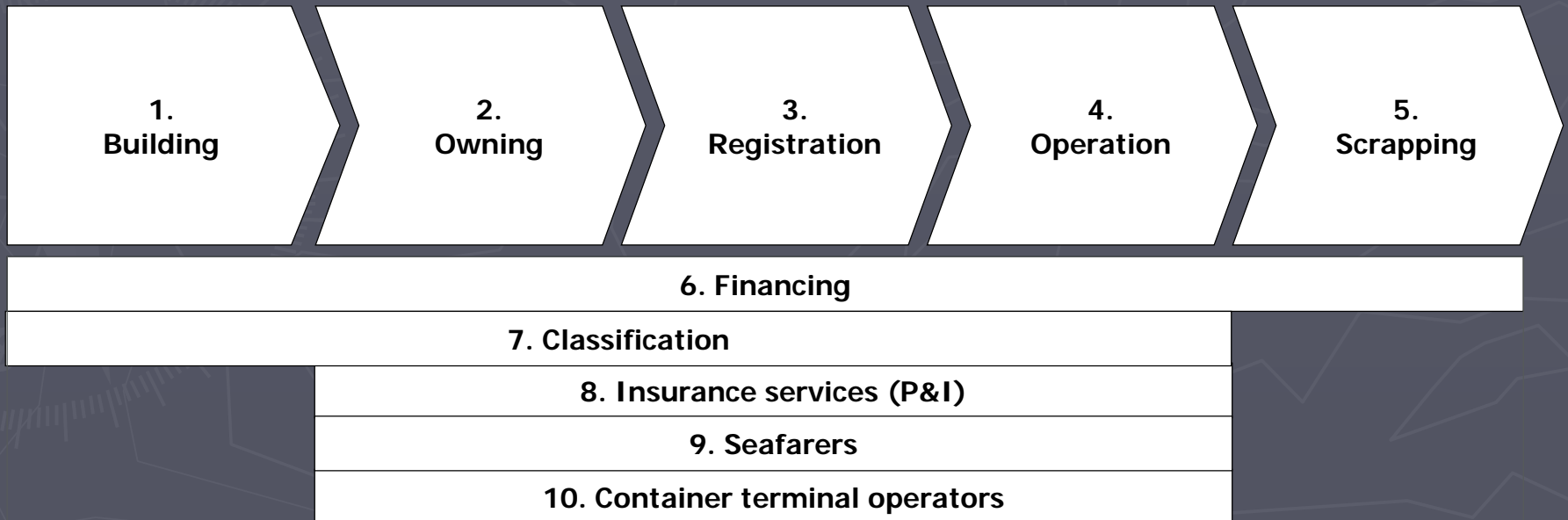
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**Figure 1.4 (b). Participation of developing economies in world seaborne trade, selected years
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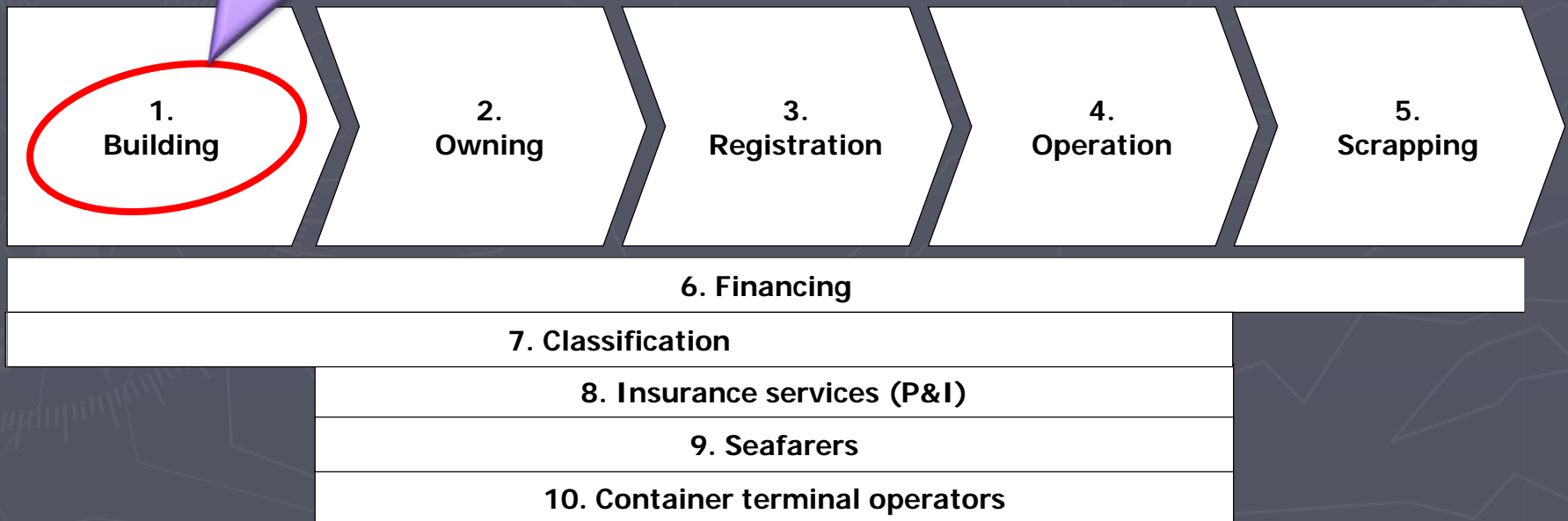
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Globalized production of "maritime transport"



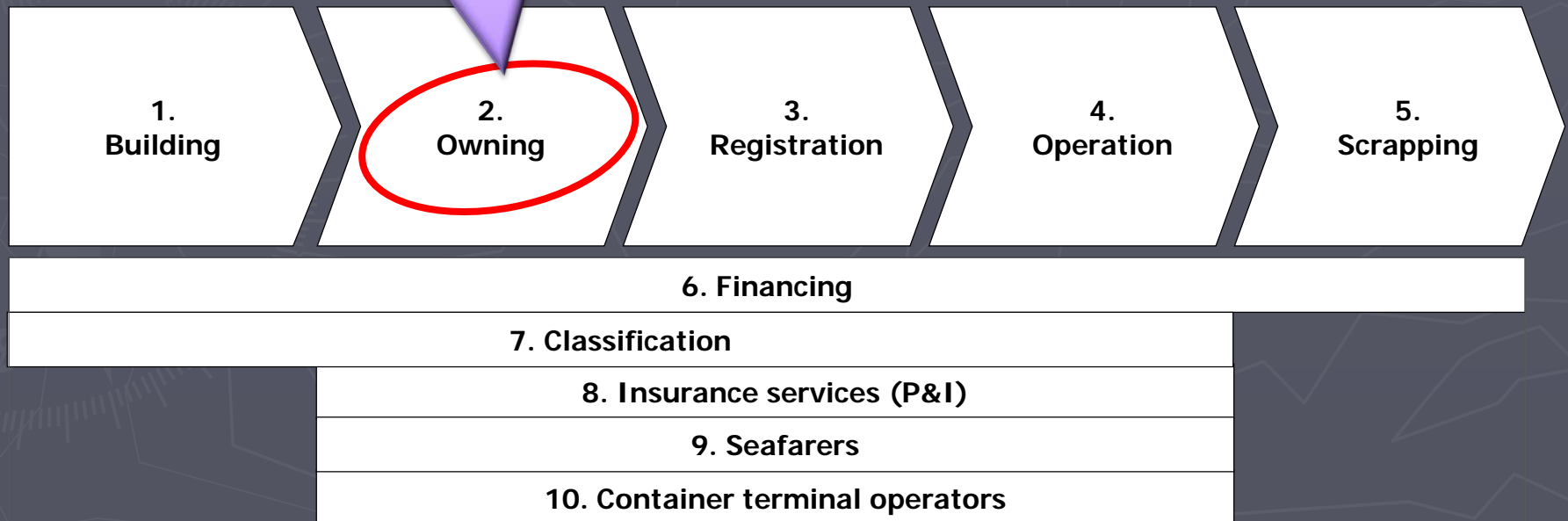
Globalized production of "maritime transport"

Korea and China
71% of GT
(RMT 2018, forthcoming)



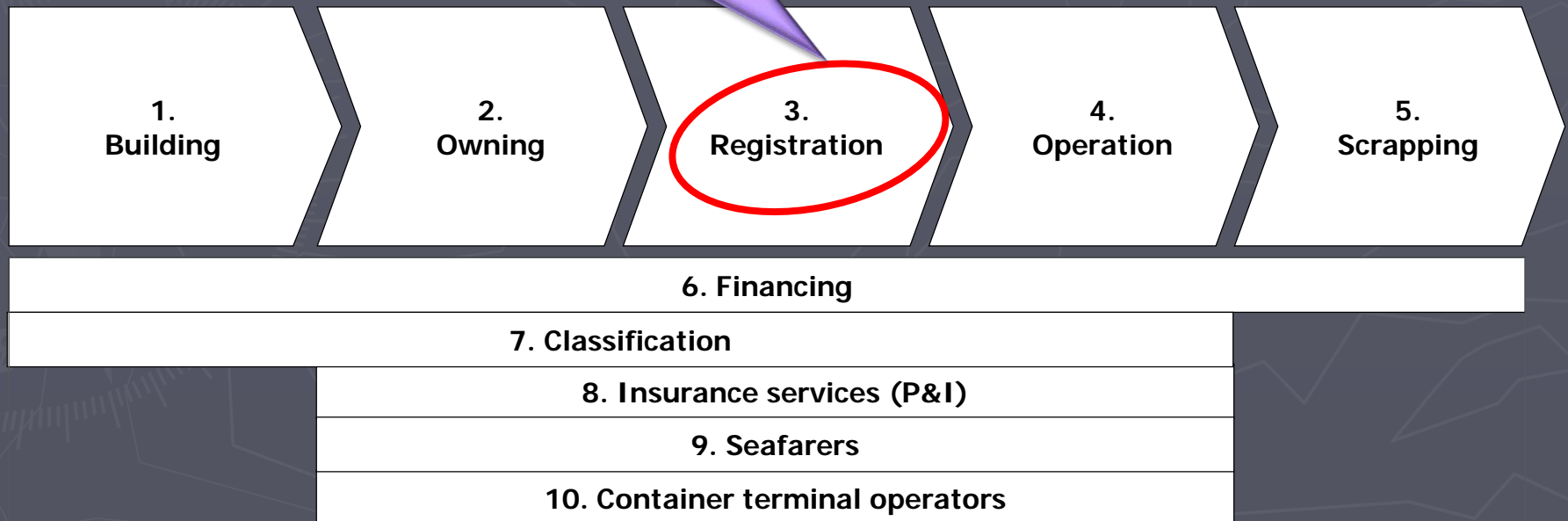
Globalized production of "maritime transport"

Greece, Japan,
China: 39% of dwt
(RMT 2018, forthcoming)



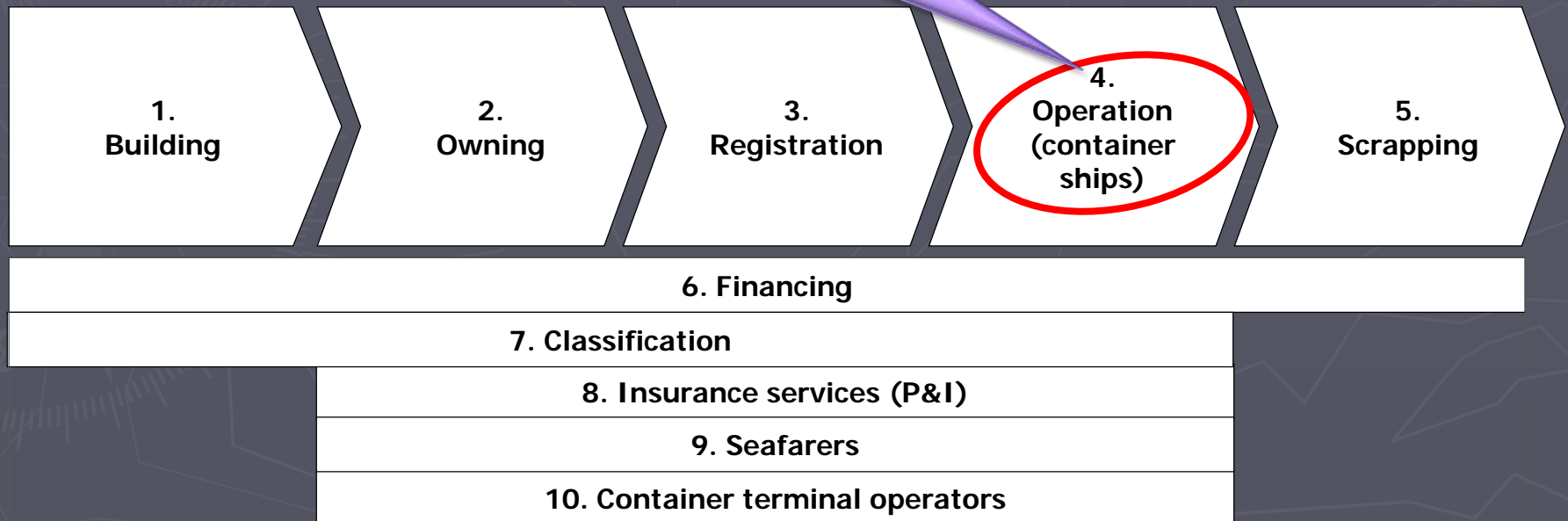
Globalized production of "maritime transport"

Panama, Marshall Islands, Liberia:
41% of dwt
(RMT 2018, forthcoming)



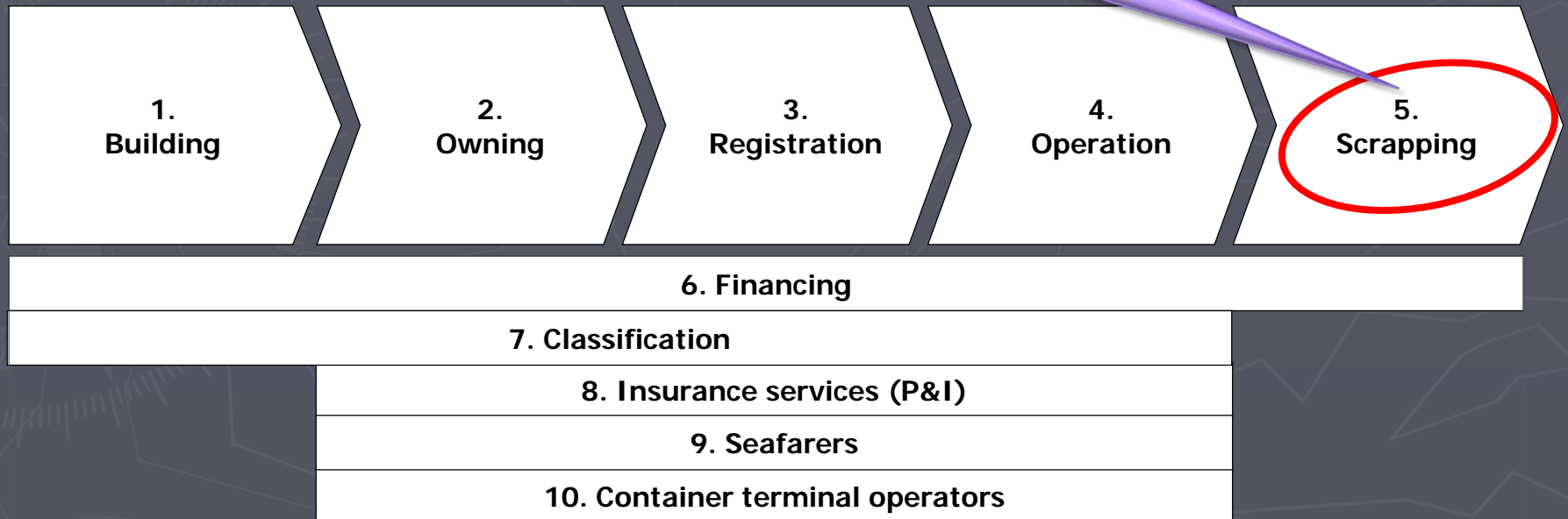
Globalized production of "maritime transport"

Denmark and
Switzerland
~ 30%
(RMT 2018, forthcoming)



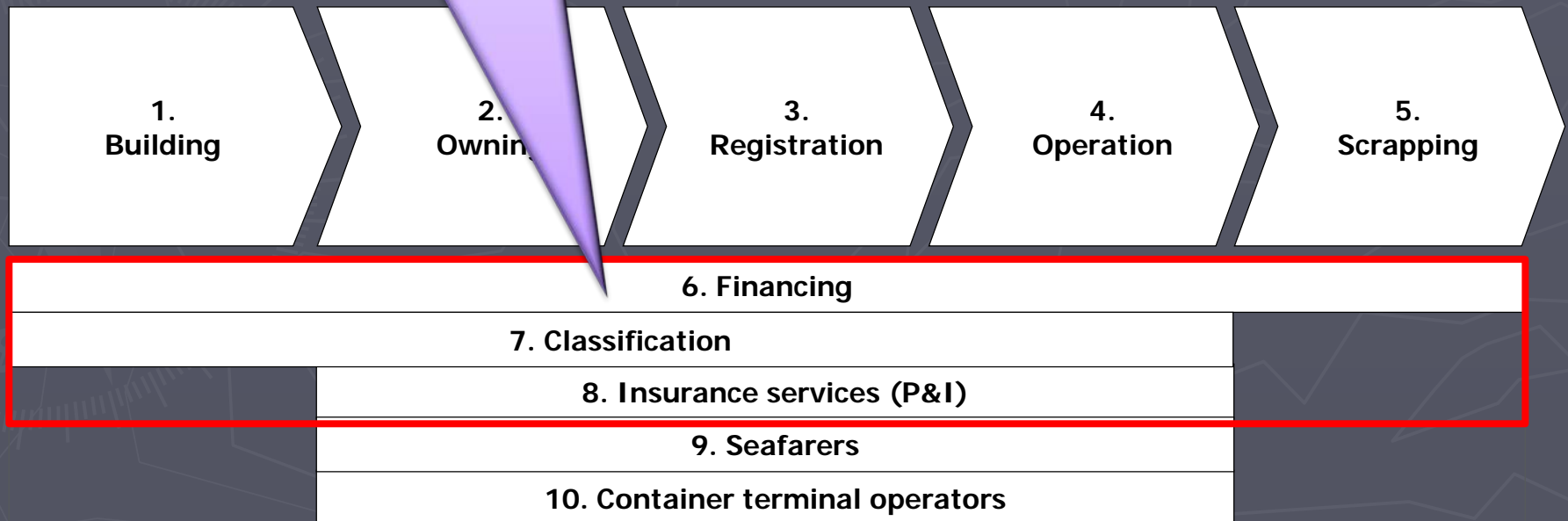
Globalized production of "maritime transport"

India,
Bangladesh, China,
Pakistan: 94%
(RMT 2018, forthcoming)



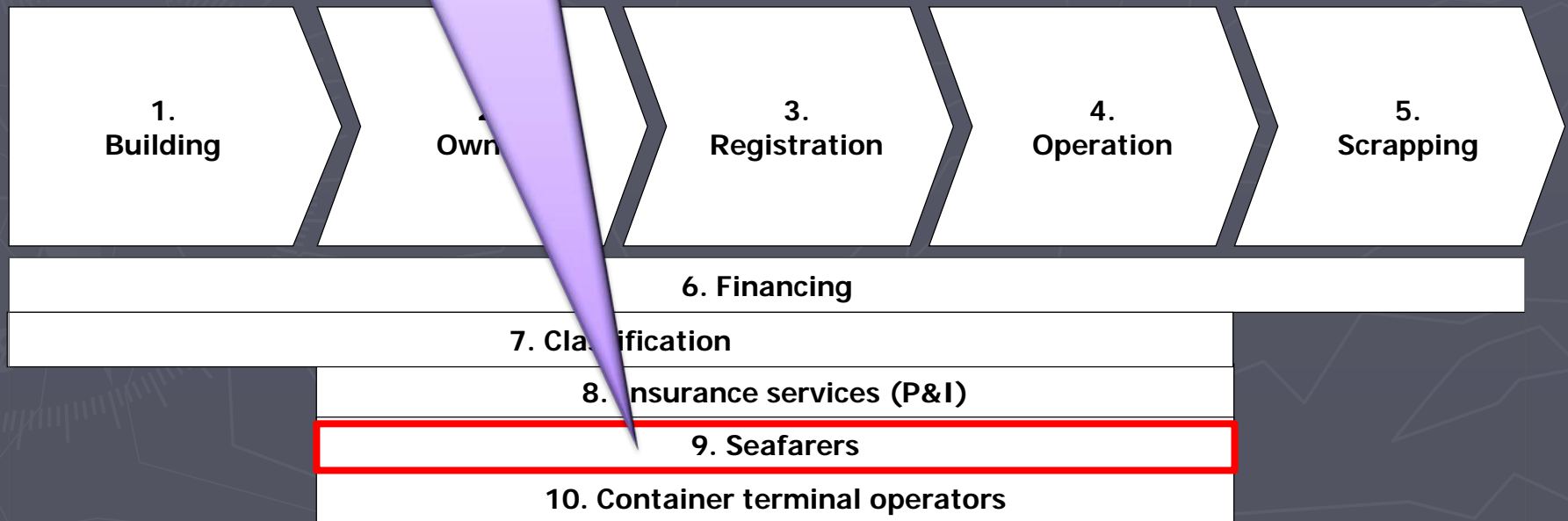
Globalized production of "maritime transport"

Financial and other services:
UK, Scandinavia



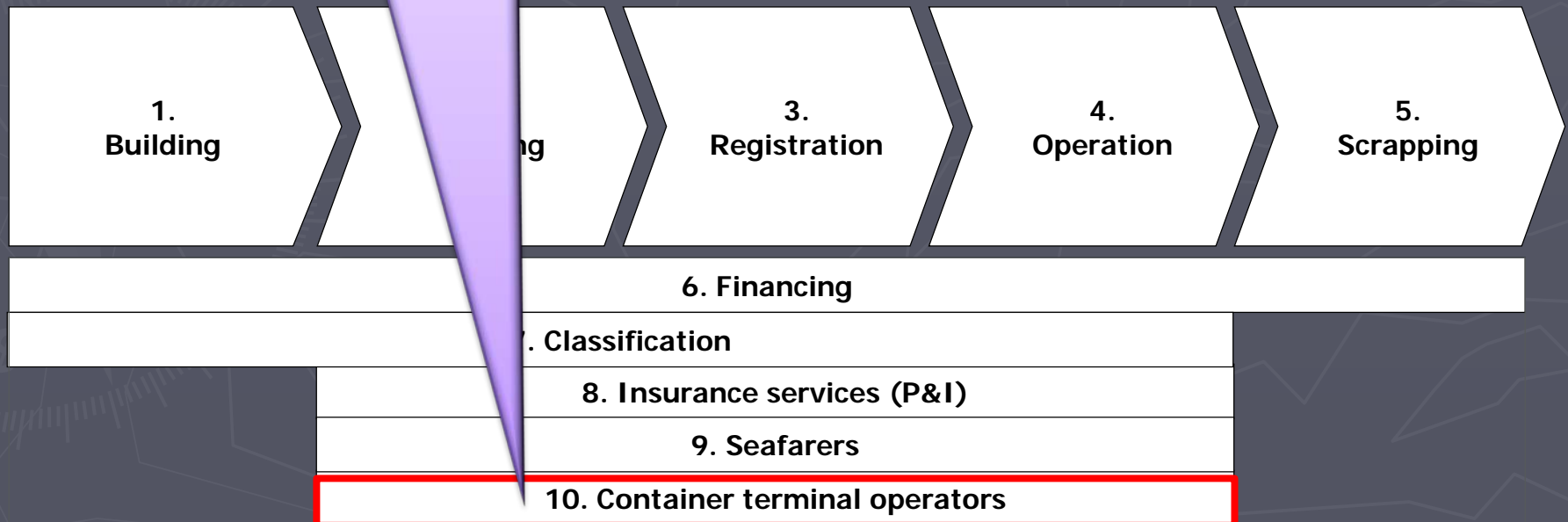
Globalized production of "maritime transport"

Philippines,
Indonesia, ...



Globalized production of "maritime transport"

Hong Kong,
Netherlands,
Singapore, UAE:
~ 30%



MARITIME PROFILE: SRI LANKA


GENERAL INFORMATION FOR 2016

 **Population**
20.798 Millions


 **GDP**
81 322 Millions current US\$


 **Merchandise trade** ¹
29 493 Millions current US\$

 **Coast/area ratio** ²
..

 **Ship building** ³
3 383 GT

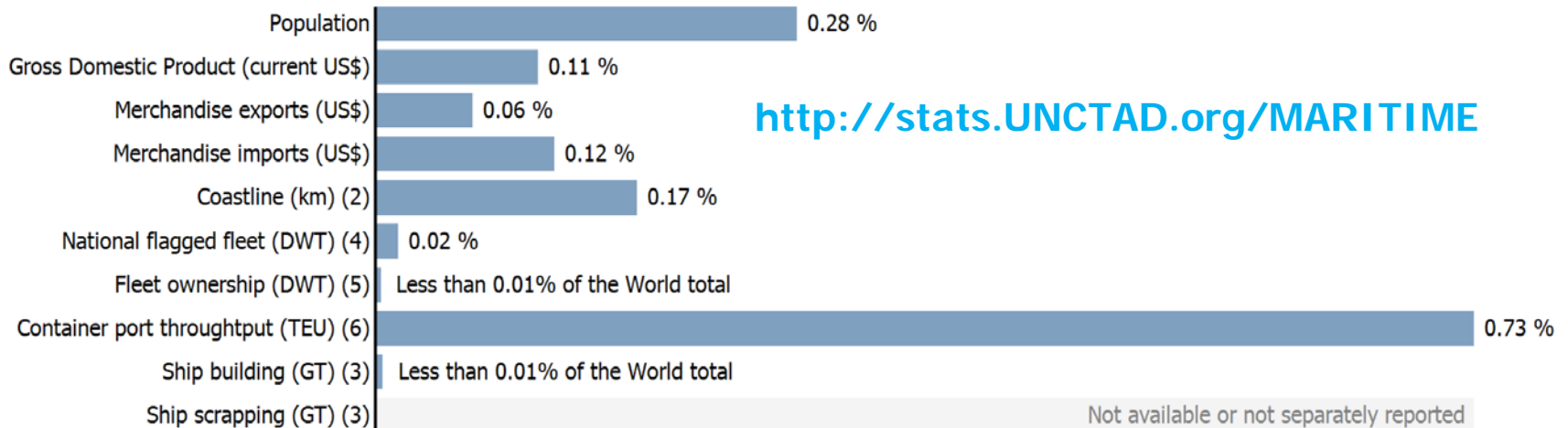
 **Ship scrapping** ³
..

 **Fleet - National flag** ⁴
276 Thousands DWT

 **Fleet - Ownership** ⁵
67 Thousands DWT

 **Container port throughput** ⁶
4 907 915 TEU

WORLD SHARES FOR 2016



<http://stats.UNCTAD.org/MARITIME>



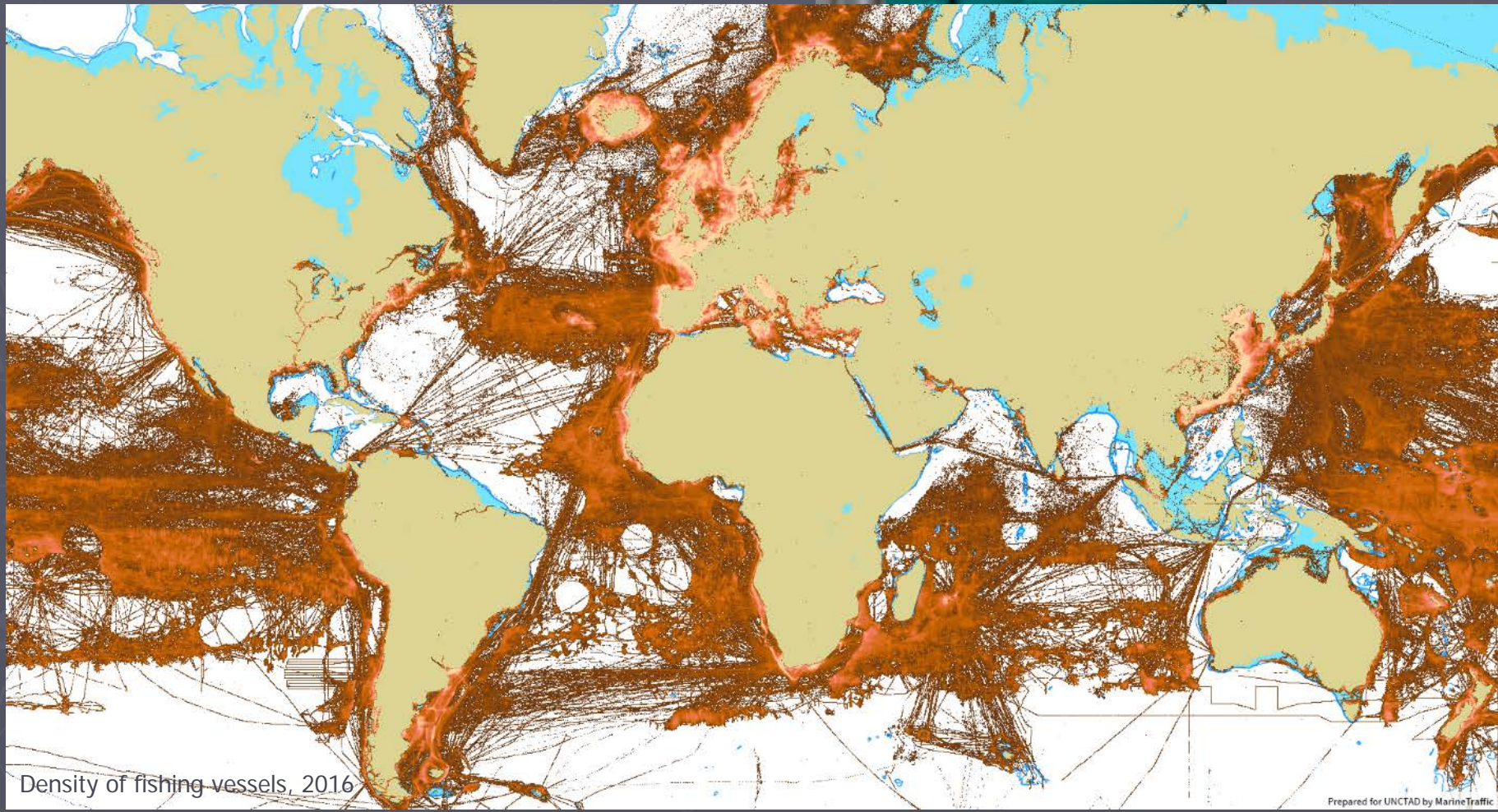
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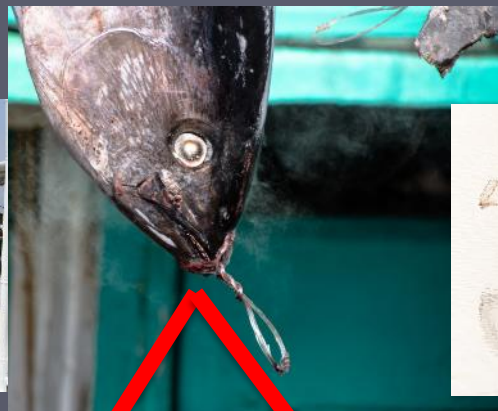
Logistics of fish

► Fishing



Logistics of fish

► Fishing

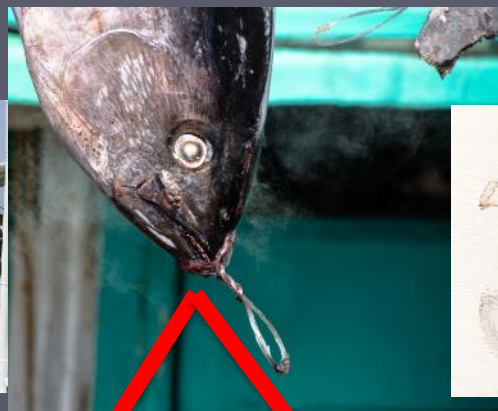


► Transshipment



Logistics of fish

► Fishing



► Transshipment

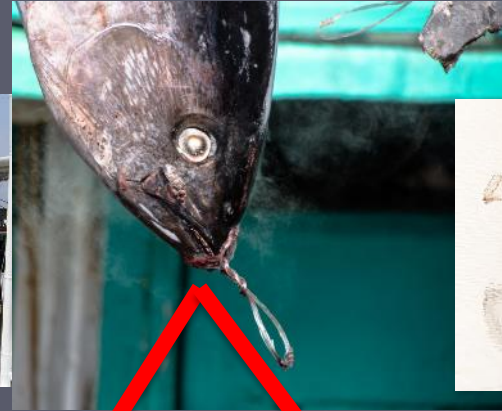


► Shipping



Logistics of fish

► Fishing



► Transshipment



► Shipping

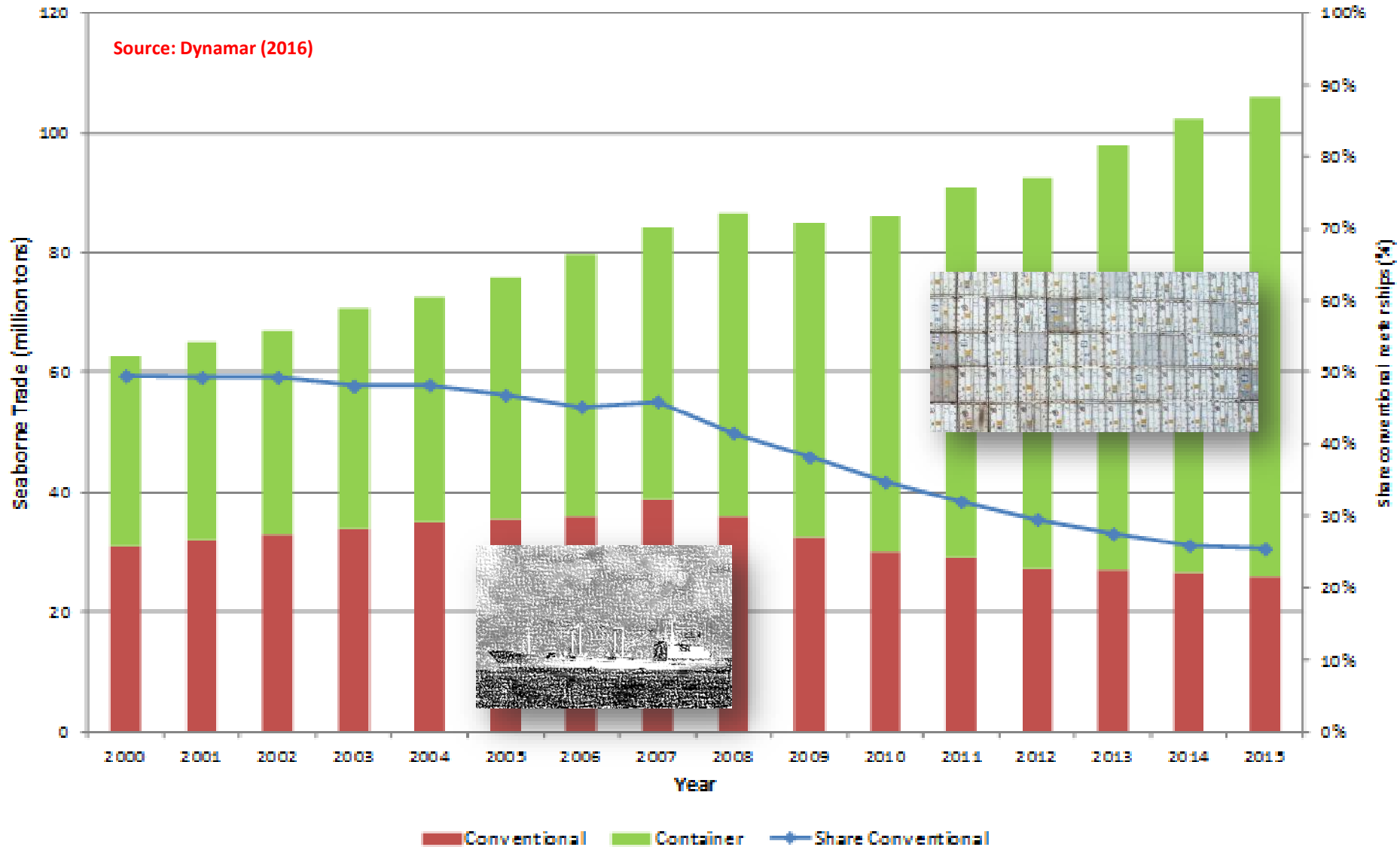


The trend: Containerization of reefer cargo

- ▶ In 1980: One Third was containerized
- ▶ Today: Three Quarters are containerized



Refrigerated cargo flows, 2000 - 2015 conventional ships / containerised



Why tranship in a port?



- ▶ Option to containerize
- ▶ Option for more value added services
- ▶ Option for better controls by authorities (quotas, quality, ...)

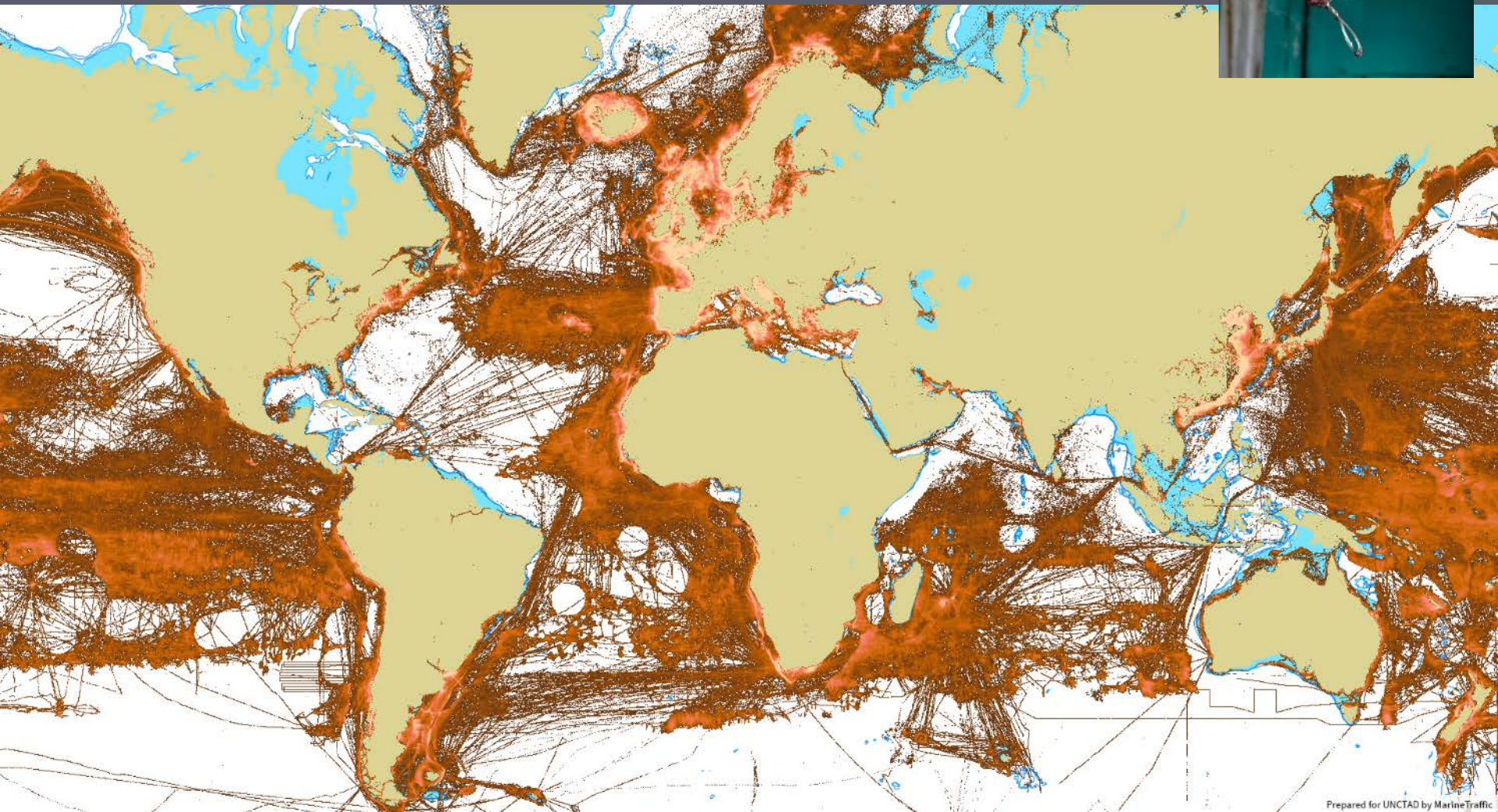


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Fishing vessels

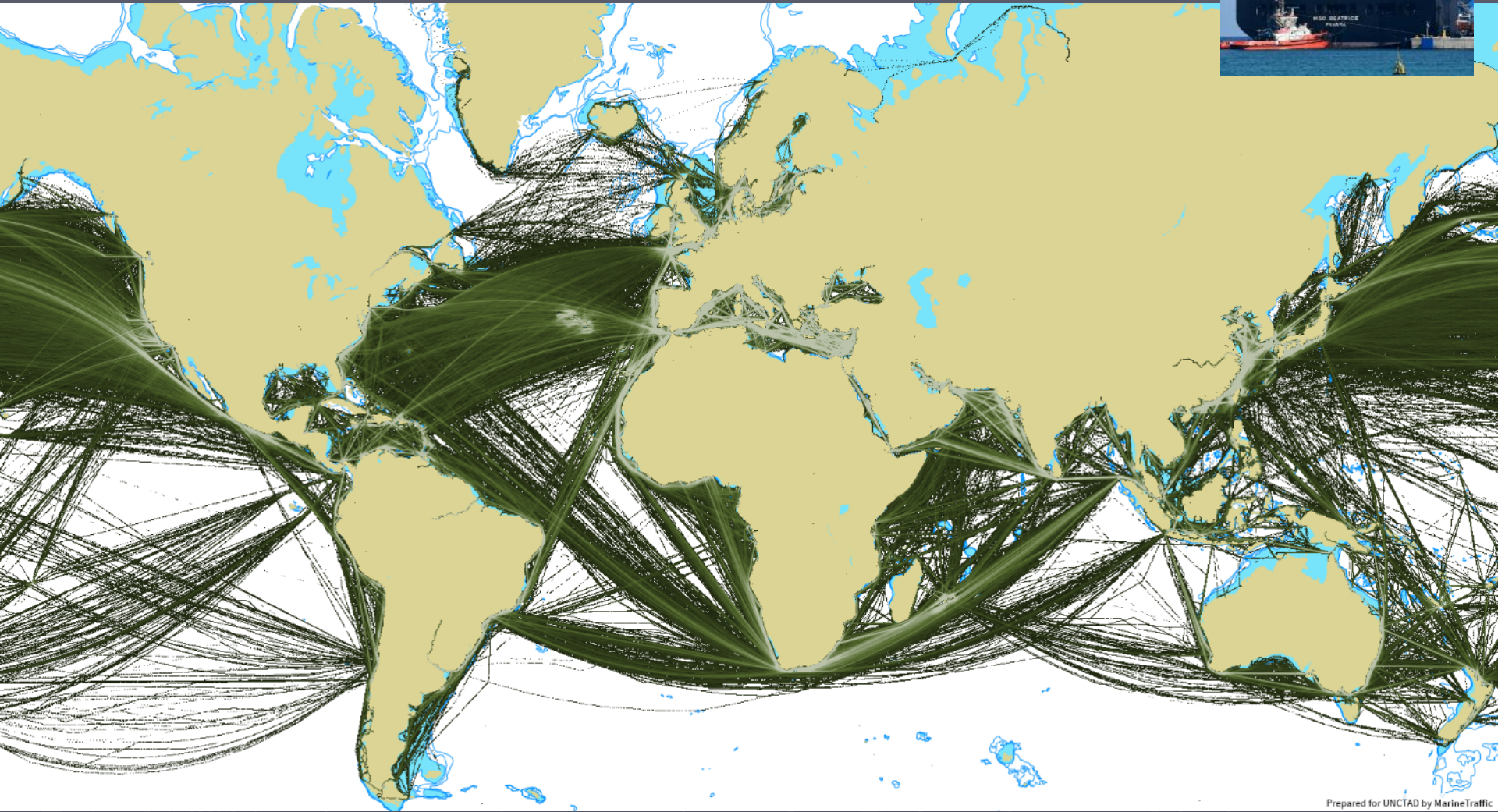


Prepared for UNCTAD by MarineTraffic

Source: Prepared for UNCTAD by Marine Traffic.

Density of vessel movements, 2016

Container ships

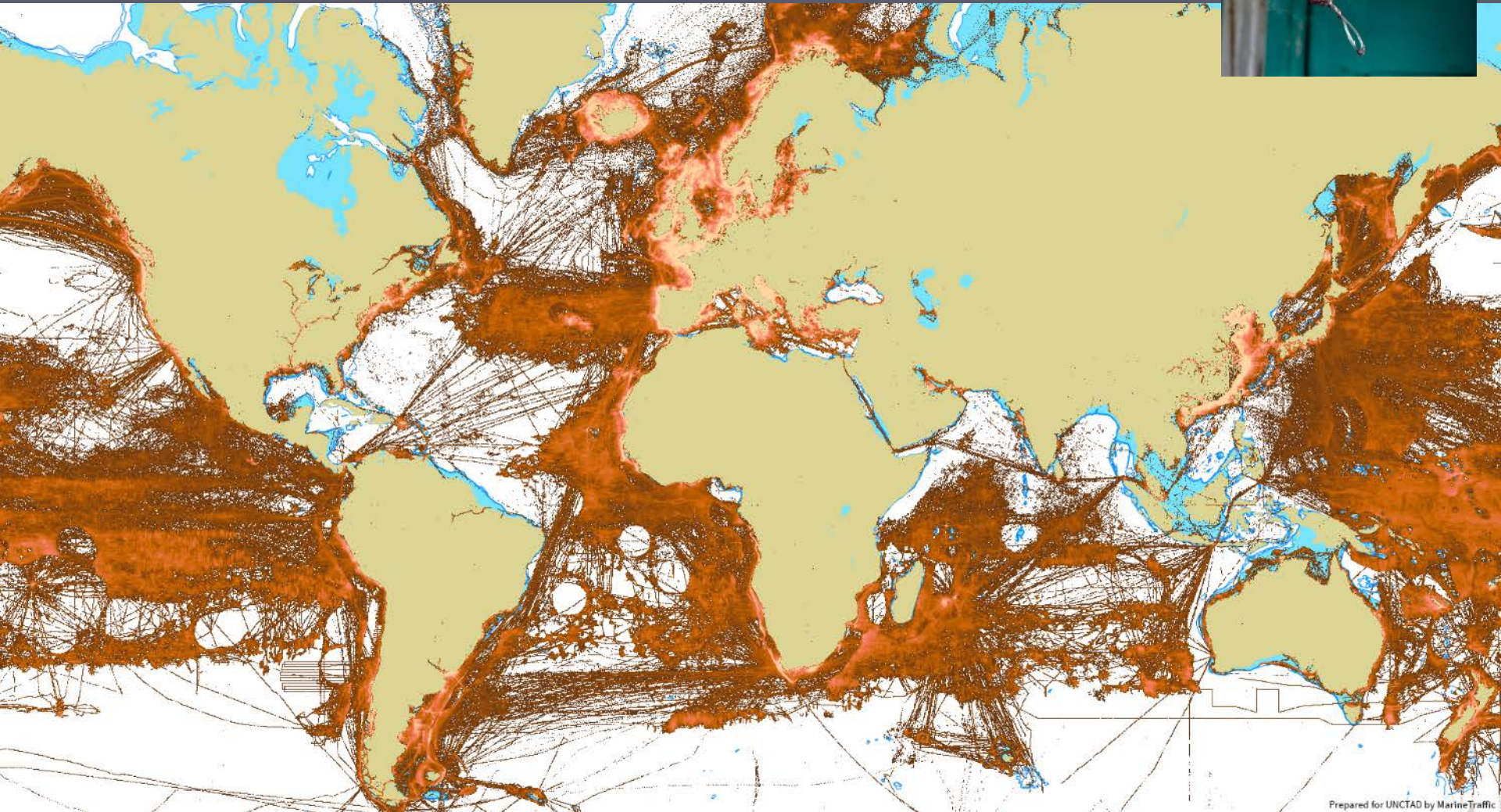


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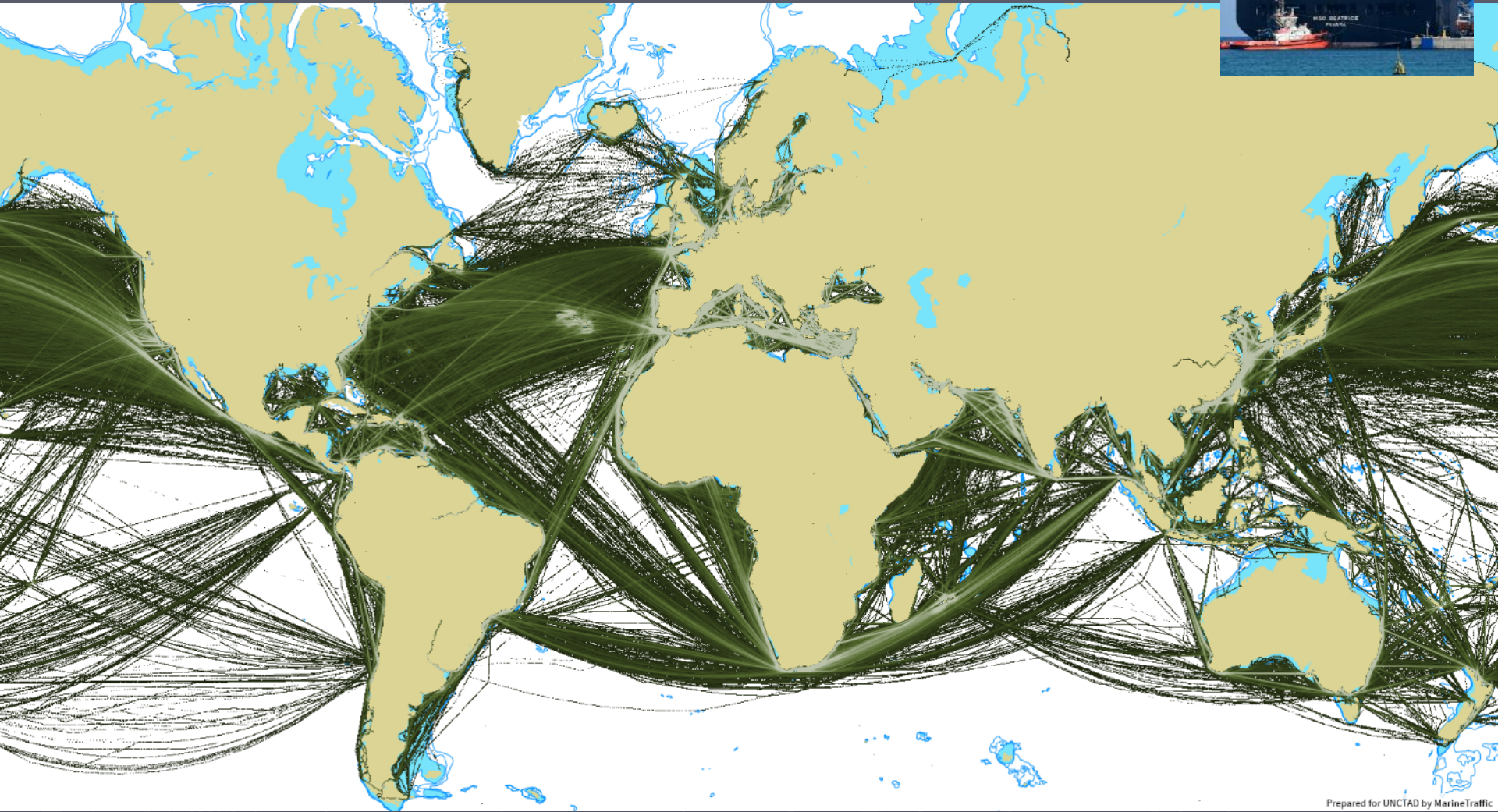


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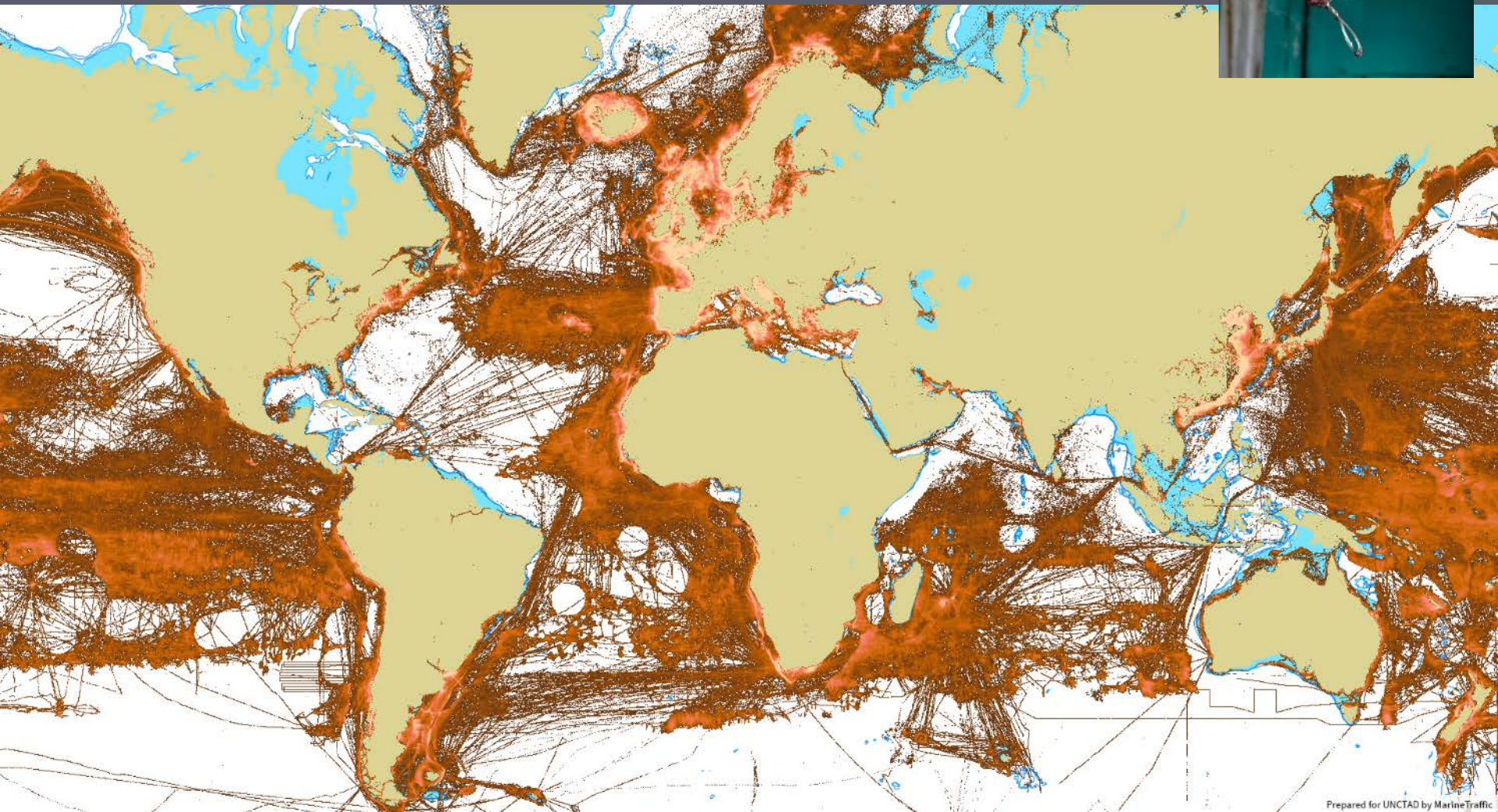


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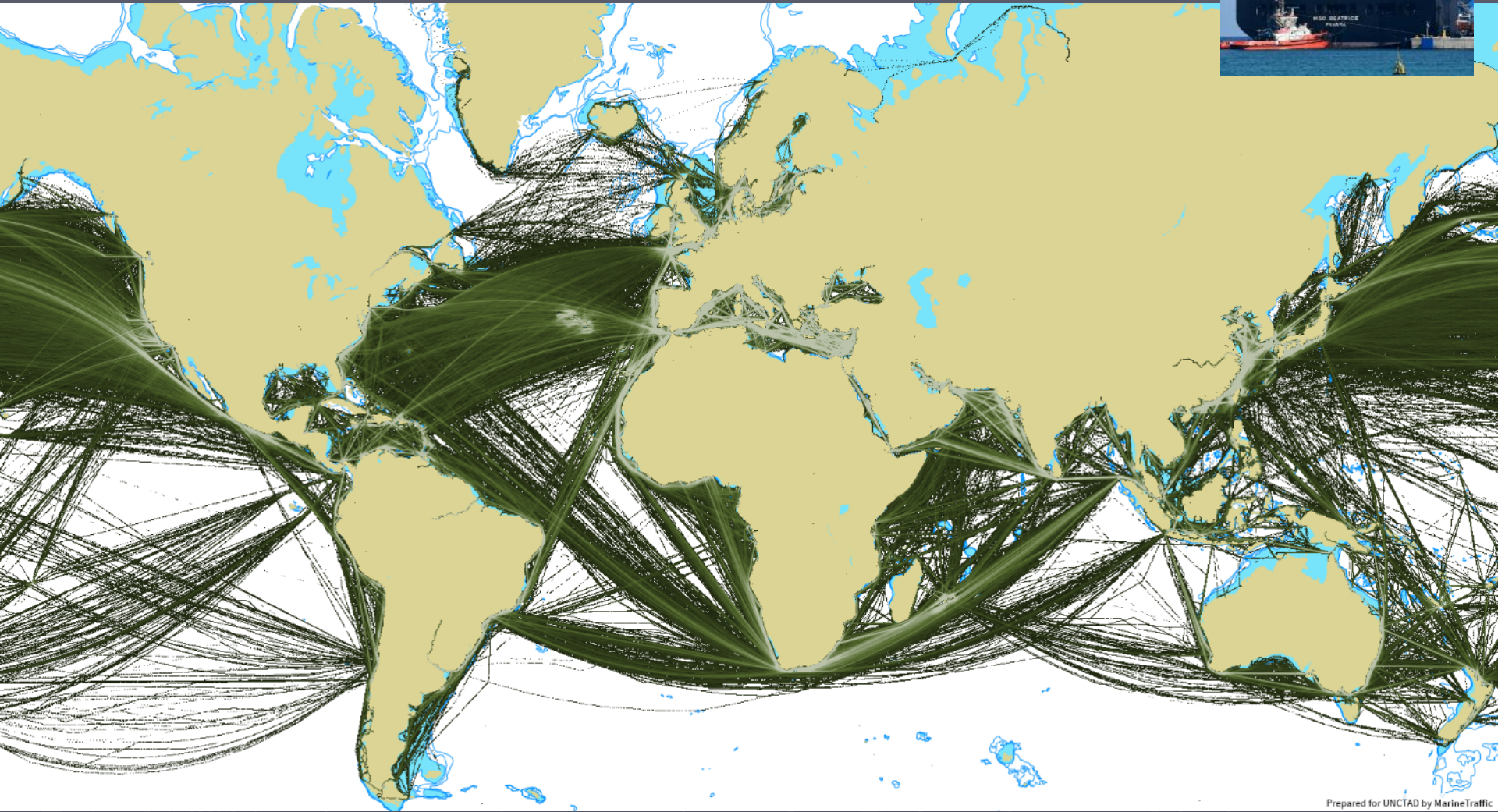


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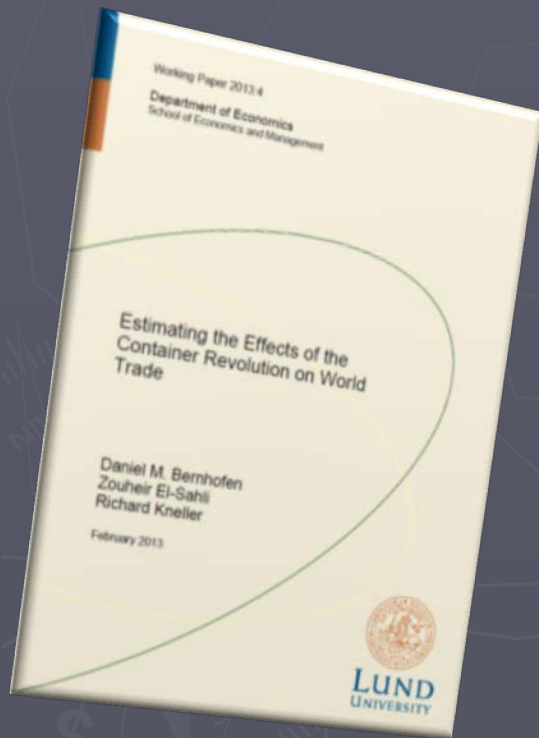


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Density of vessel movements, 2016

Introducing containerization leads to more trade

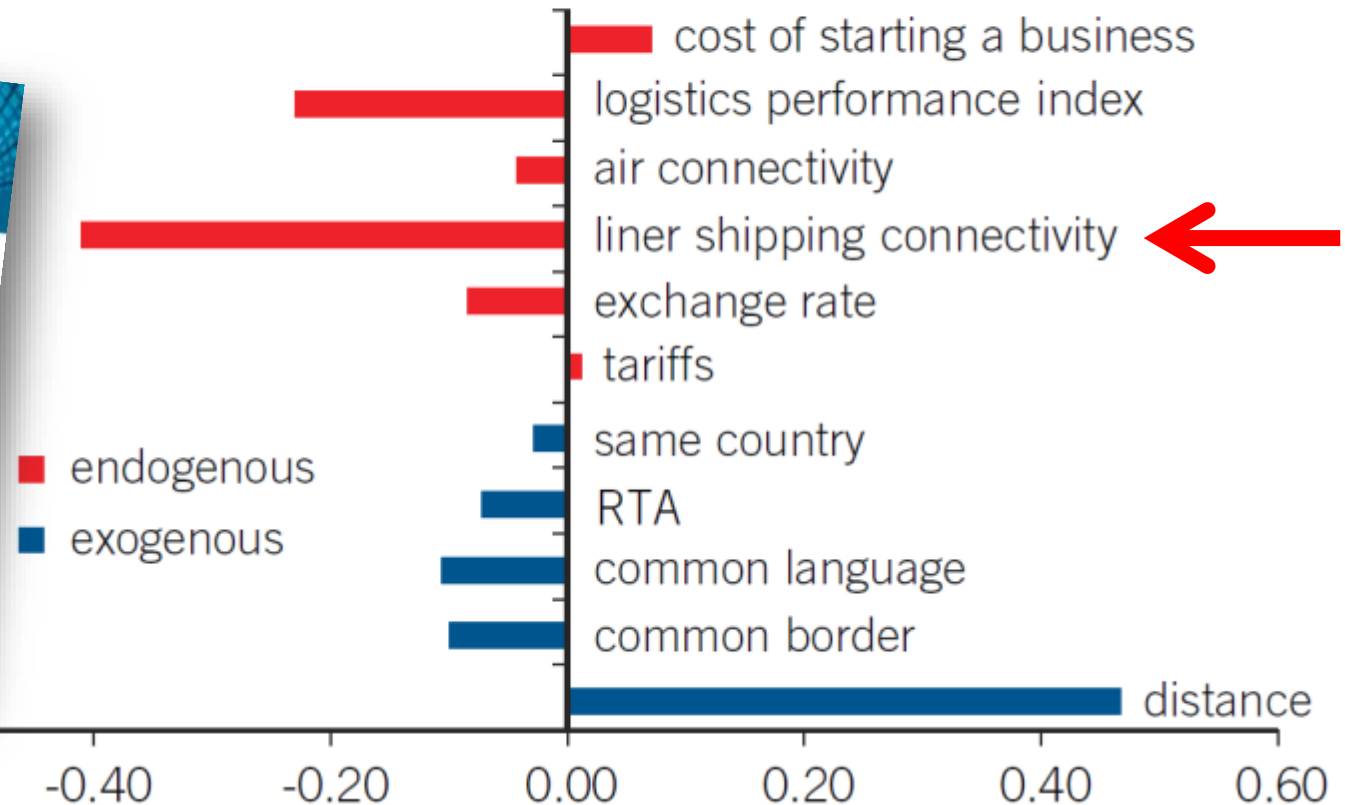


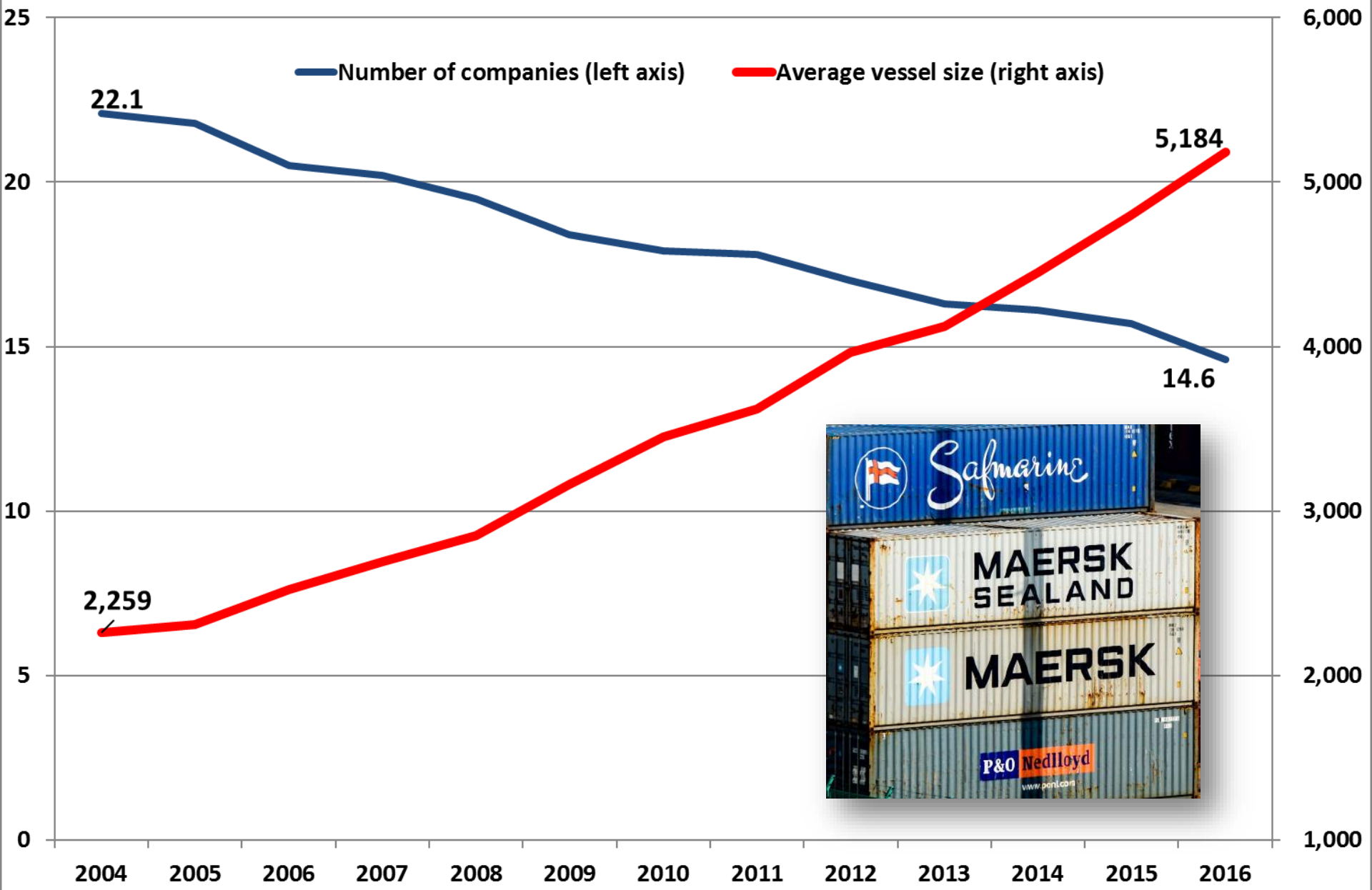
(Bernhofen et al, 2013)

Higher Liner Shipping Connectivity leads to lower trade costs

Figure 1. Relative Impact of Different Sources of Trade Costs

(normalized regression coefficients [“betas”] against the indicator measuring the cost component)





Source: UNCTAD Liner Shipping Connectivity Matrix

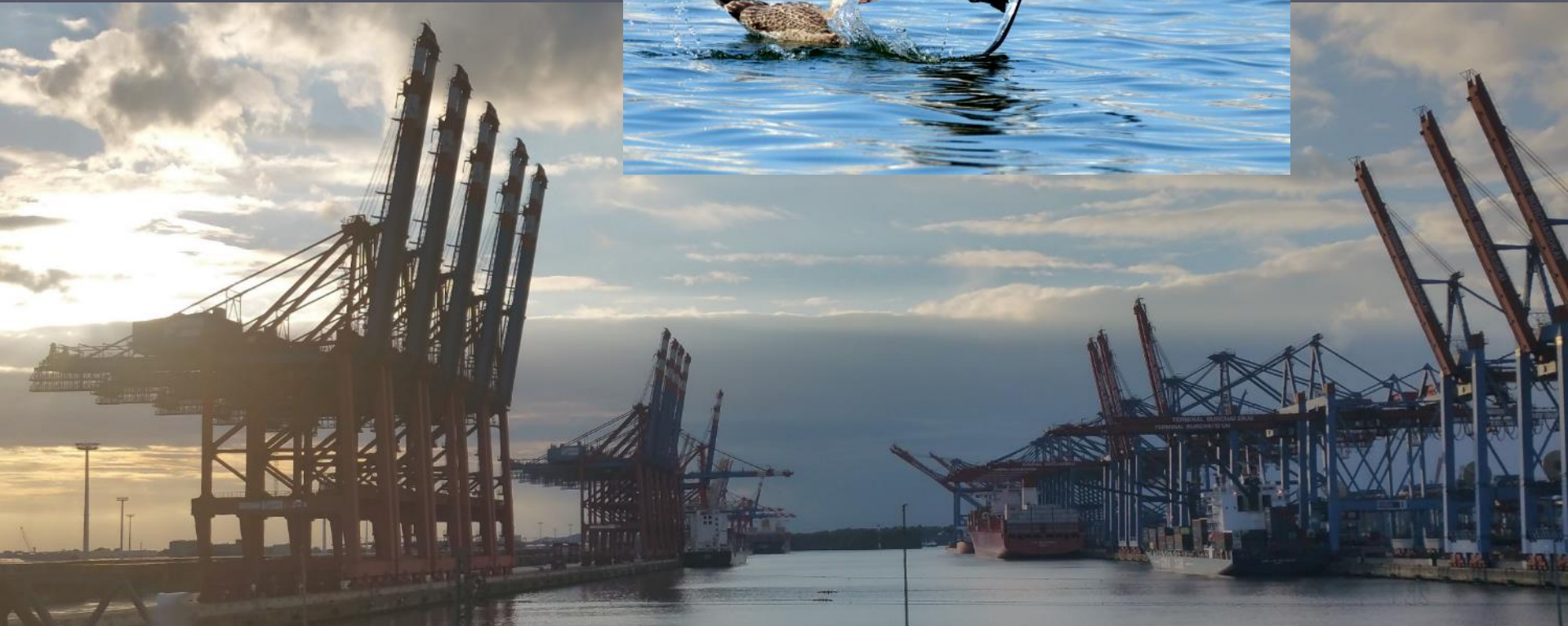


Today's container shipping

- ▶ Ever larger ships
- ▶ Extremely low freight rates
- ▶ Idle fleet



Why is this a problem?



Why is this a problem?

1) Total logistics costs may actually go up



Why is this a problem?

2) It's a game:

Unless old ships are scrapped, the oversupply will remain, or rather, increase, as carriers build new and larger ships



Why is this a problem?

3) Potential oligopolies in small markets

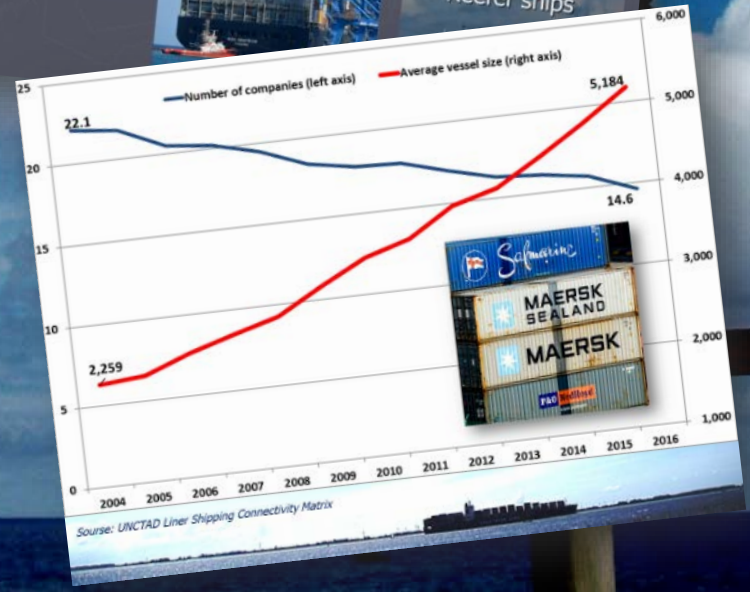


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