

# ***UNCTAD Review of Maritime Transport 2020*** **and key trends in ports and shipping, in times of the COVID-19 pandemic**

## **- International Maritime Trade and Port Traffic**

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*[Hassiba.Benamara@UN.org](mailto:Hassiba.Benamara@UN.org)*

**Short courses on key international economic and development issues  
for delegates from permanent missions to the United Nations Office at Geneva  
and the World Trade Organization**

**First semester 2021**





- 1) **BC:**  
Long term trends  
**Before Corona**
  
- 2) **DC:**  
Waves of demand and supply  
**During Corona**
  
- 3) **AC:**  
Long term perspectives  
**After Corona**



**1) BC:**

Long term trends  
**Before Corona**

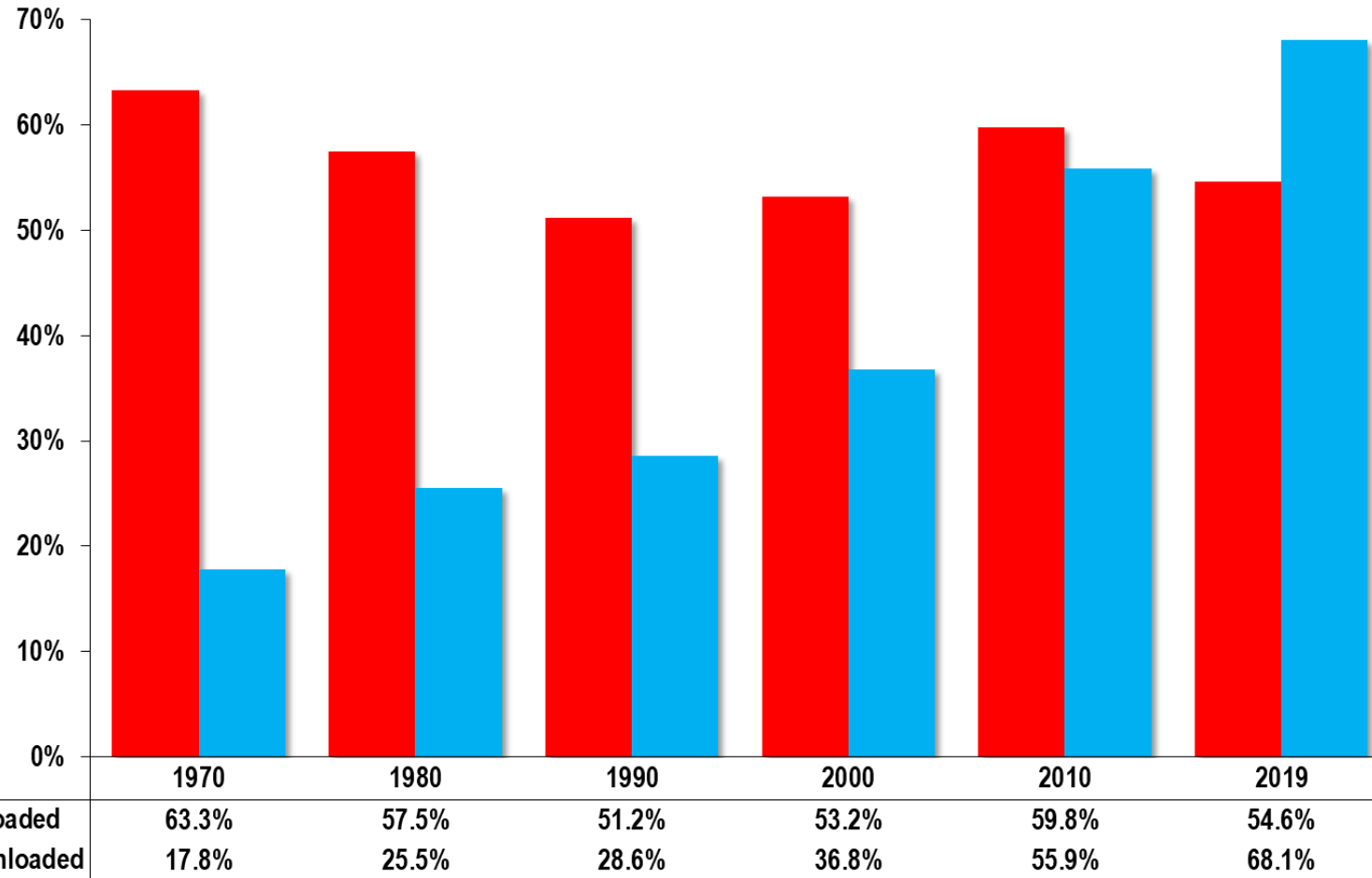
**2) DC:**

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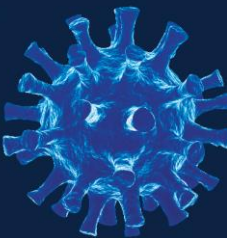
## Seaborne trade: share of (1970) developing countries



Share of developing countries in seaborne trade (tonnes)

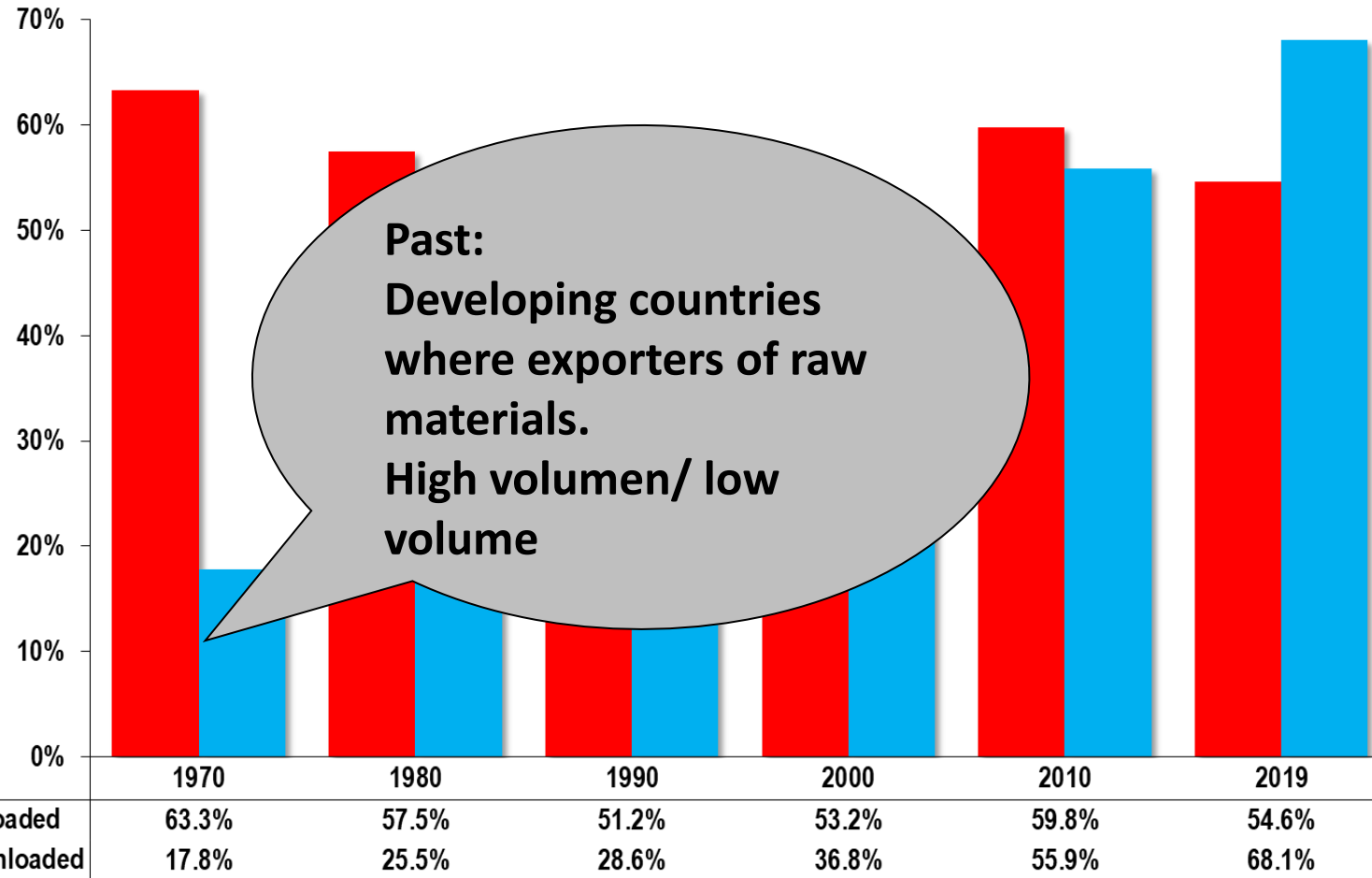
REVIEW  
OF MARITIME  
TRANSPORT

2020



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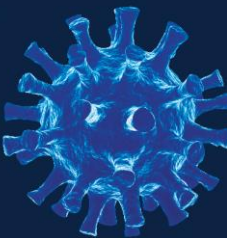
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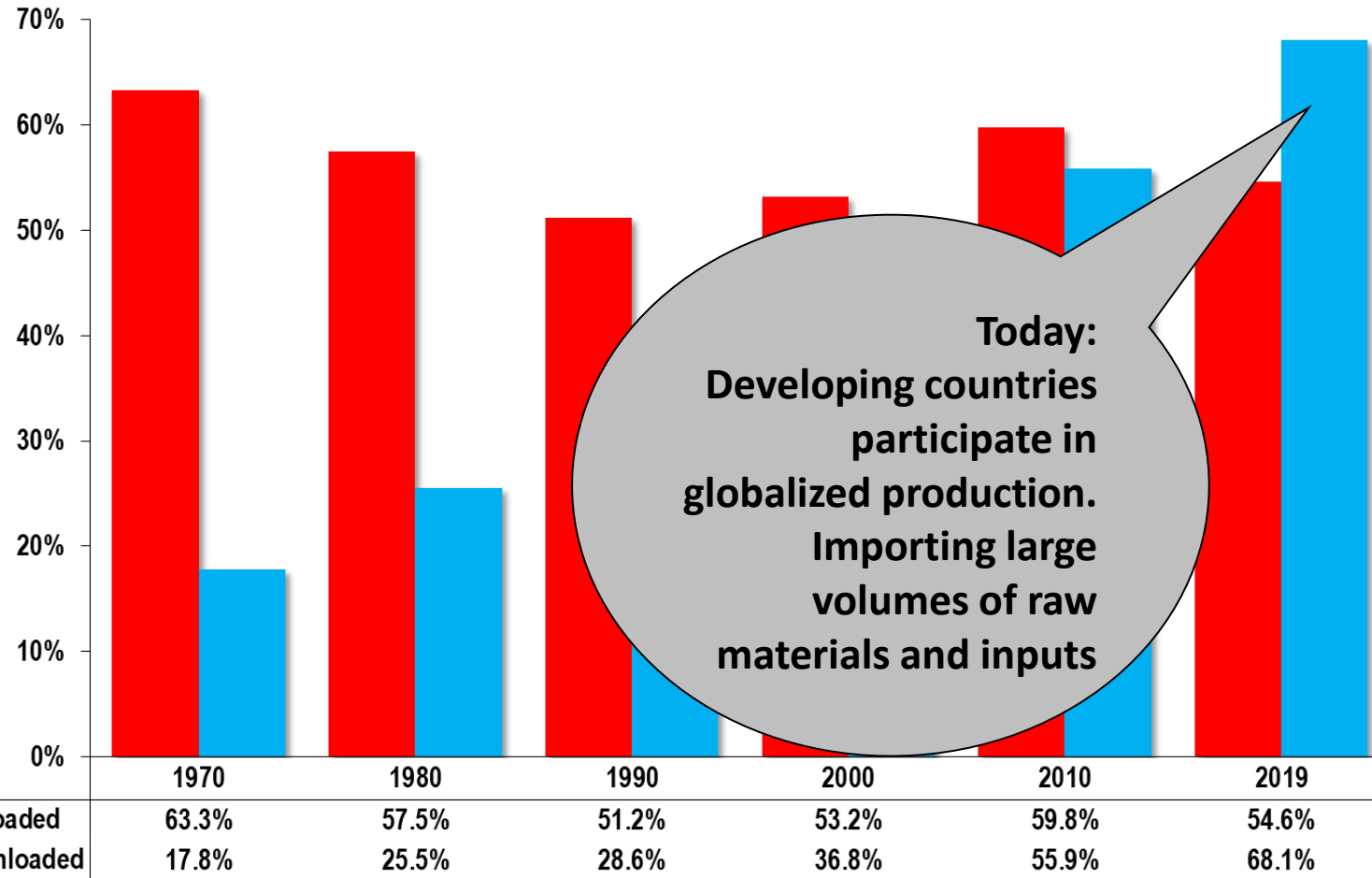
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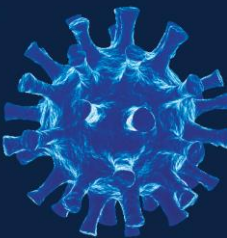
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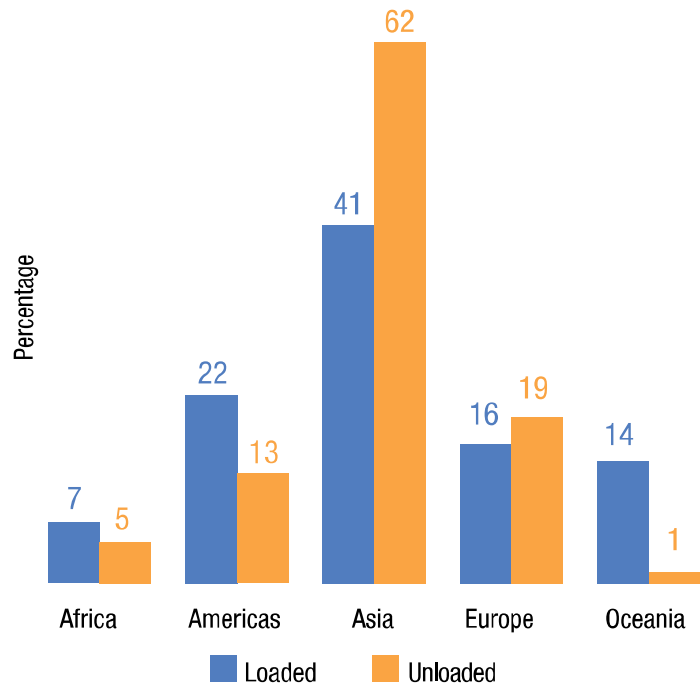
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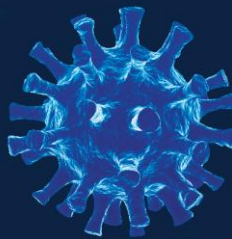


Figure 1.3 International maritime trade, by region, 2019  
(Percentage share in total tonnage)



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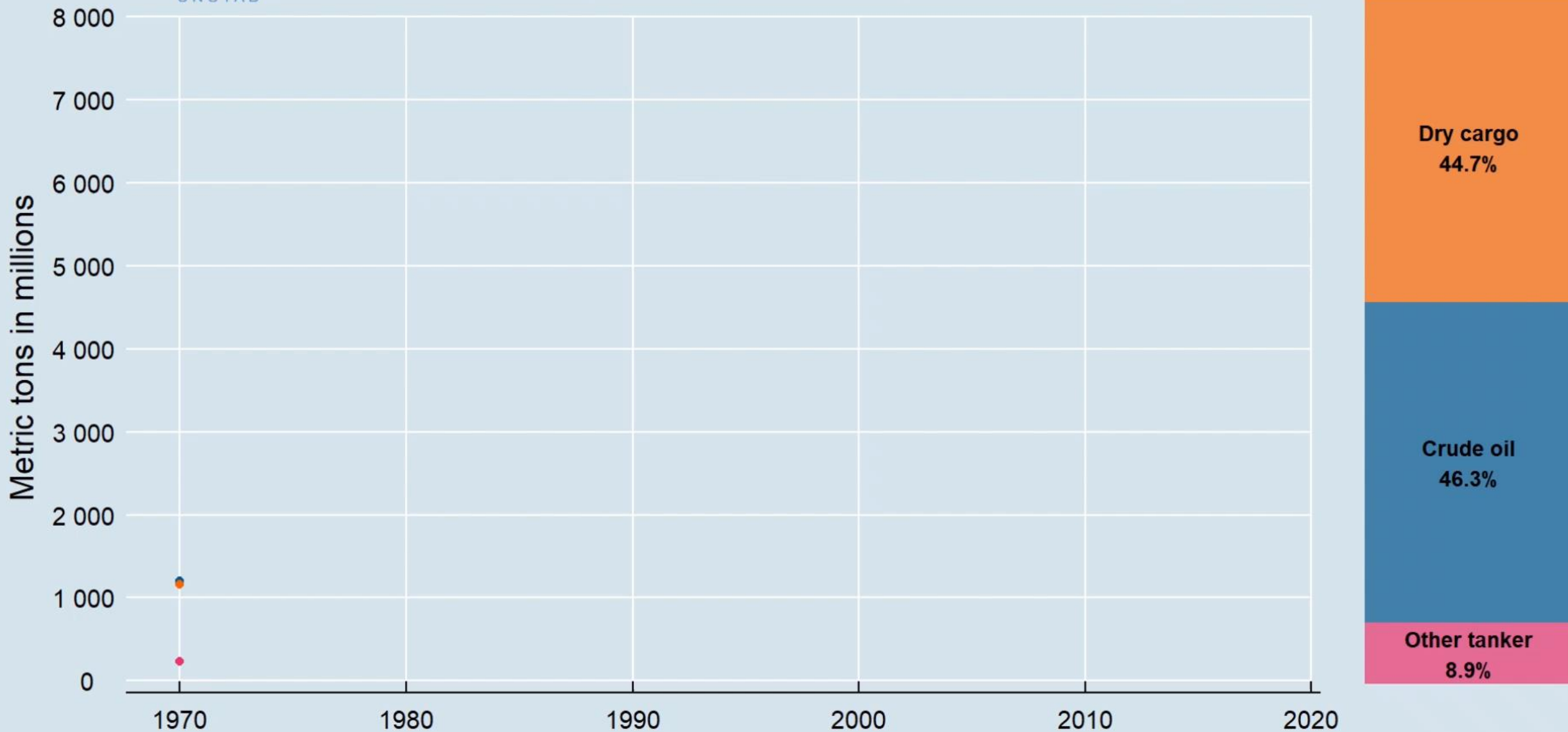
2020





# The Evolution of Seaborne Trade, 1970-2018

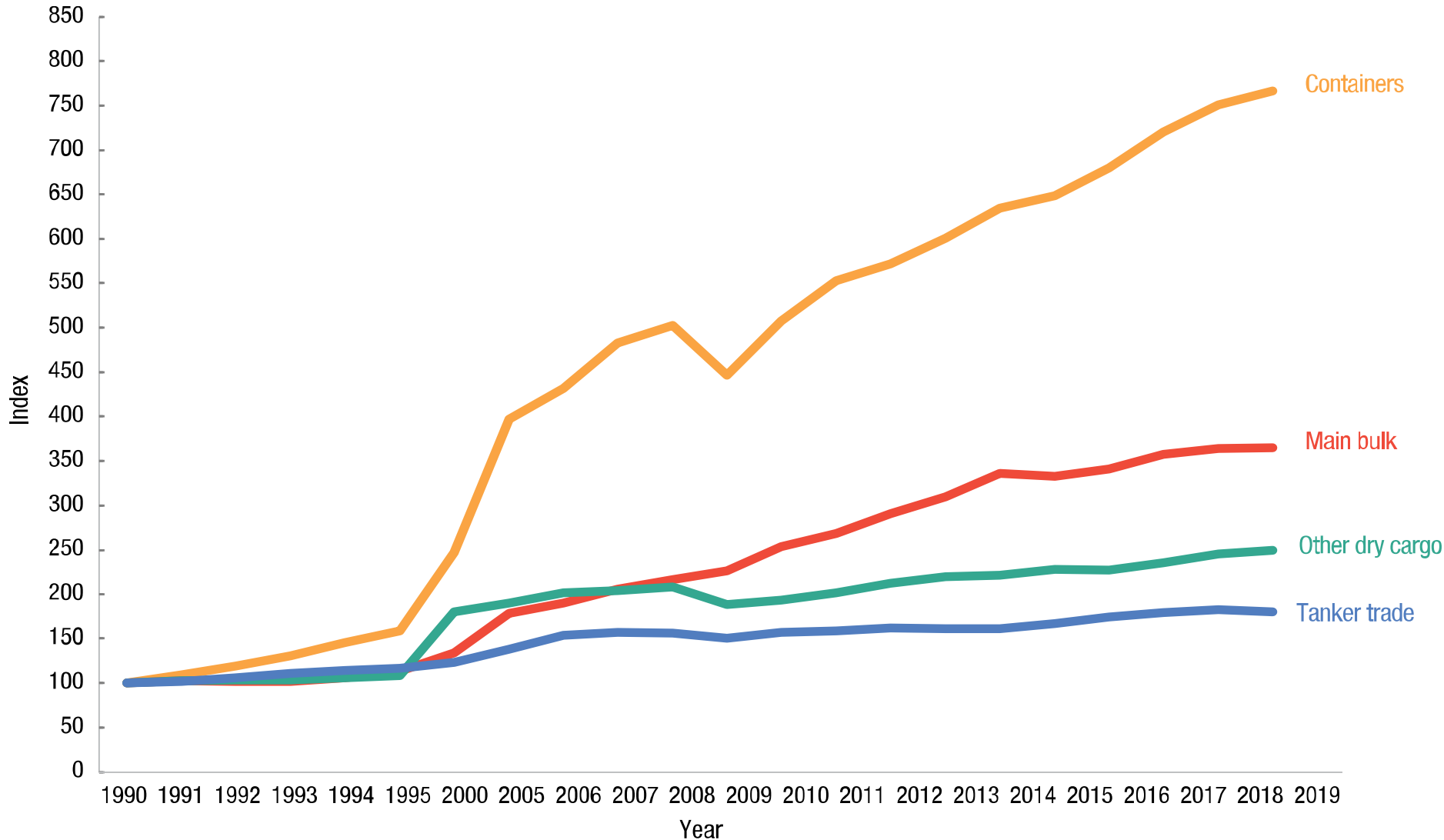
Goods loaded by cargo type, million metric tons and percentage shares



Source: UNCTAD - <http://stats.unctad.org/maritime>, 2019

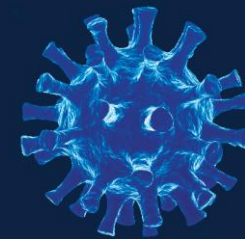


# International maritime trade by cargo type (Index: 1990 = 100)



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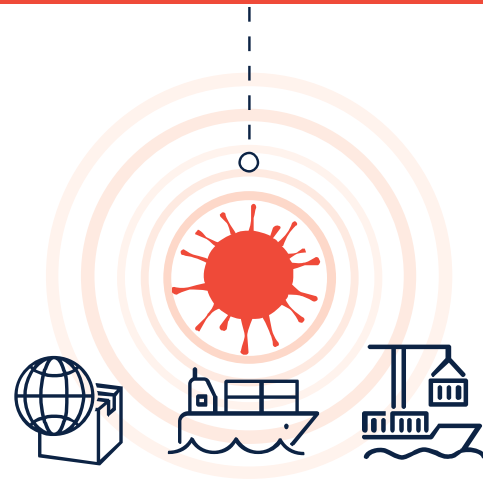
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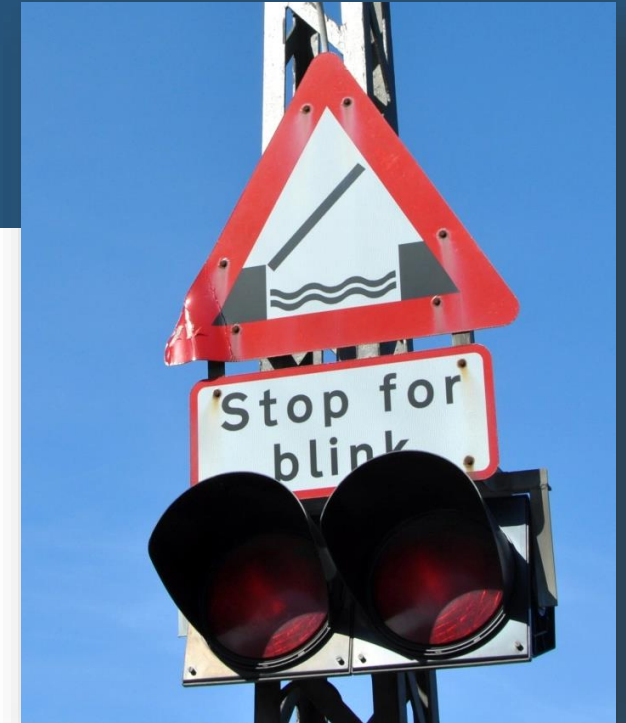
**3) AC:**

Long term perspectives  
**After Corona**

COVID-19 DISRUPTION



Shockwaves through  
supply chains, shipping and  
ports



**Splash** 247.com

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Containers Dry Cargo Europe Gas Operators Tankers

# Stopford's worst-case scenario: sea trade declines 17% by 2024

36 2 minutes read

Sam Chambers - May 15, 2020



**Splash** @Splash\_247

Clarksons warns seaborne trade could contract by 5% in 2020, the largest decline for over 35 years

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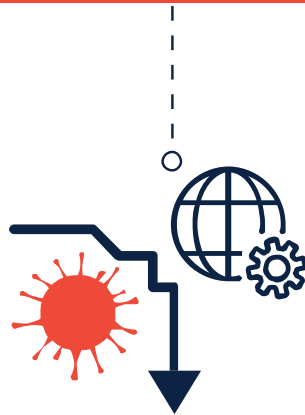


am - 22 Apr 2020 · dlvr.it

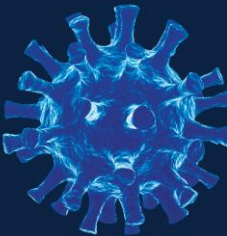
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COVID-19 DISRUPTION



International maritime  
trade projected to fall by  
**4.1% in 2020**



Splash @Splash\_247

Clarksons warns seaborne trade could contract by 5% in 2020, the largest decline for over 35 years  
dlvr.it/RVCz49

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## Annual Global Seaborne Trade Growth (Tonnes)

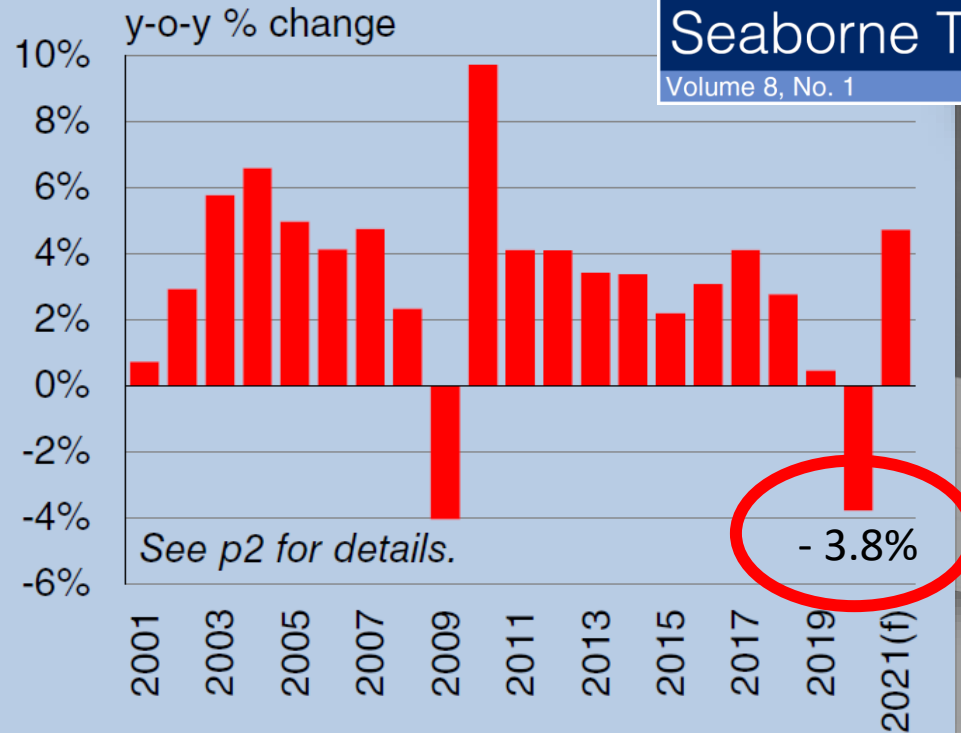


Clarksons Research

### Seaborne Trade Monitor

Volume 8, No. 1

January-2021





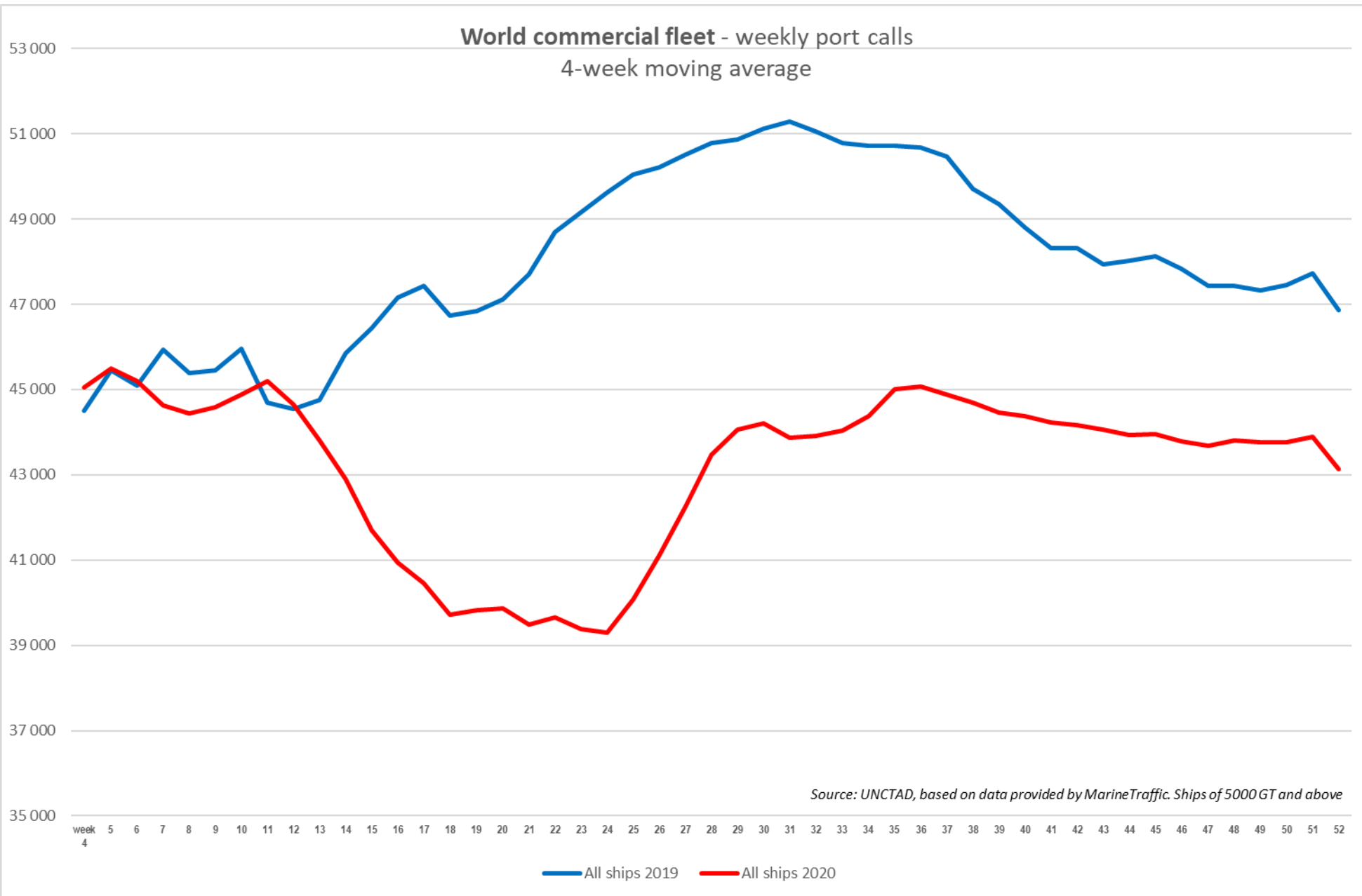
# Why did seaborne trade not decline more?

1. The GDP/Trade ratio of the past changed.  
We have more services in the GDP
2. Companies increased inventories
3. The maritime industry responded well.  
Ports and ships kept operating
4. Some segments recorded an increase in demand  
as people in lock-down buy more stuff



World commercial fleet - weekly port calls  
4-week moving average

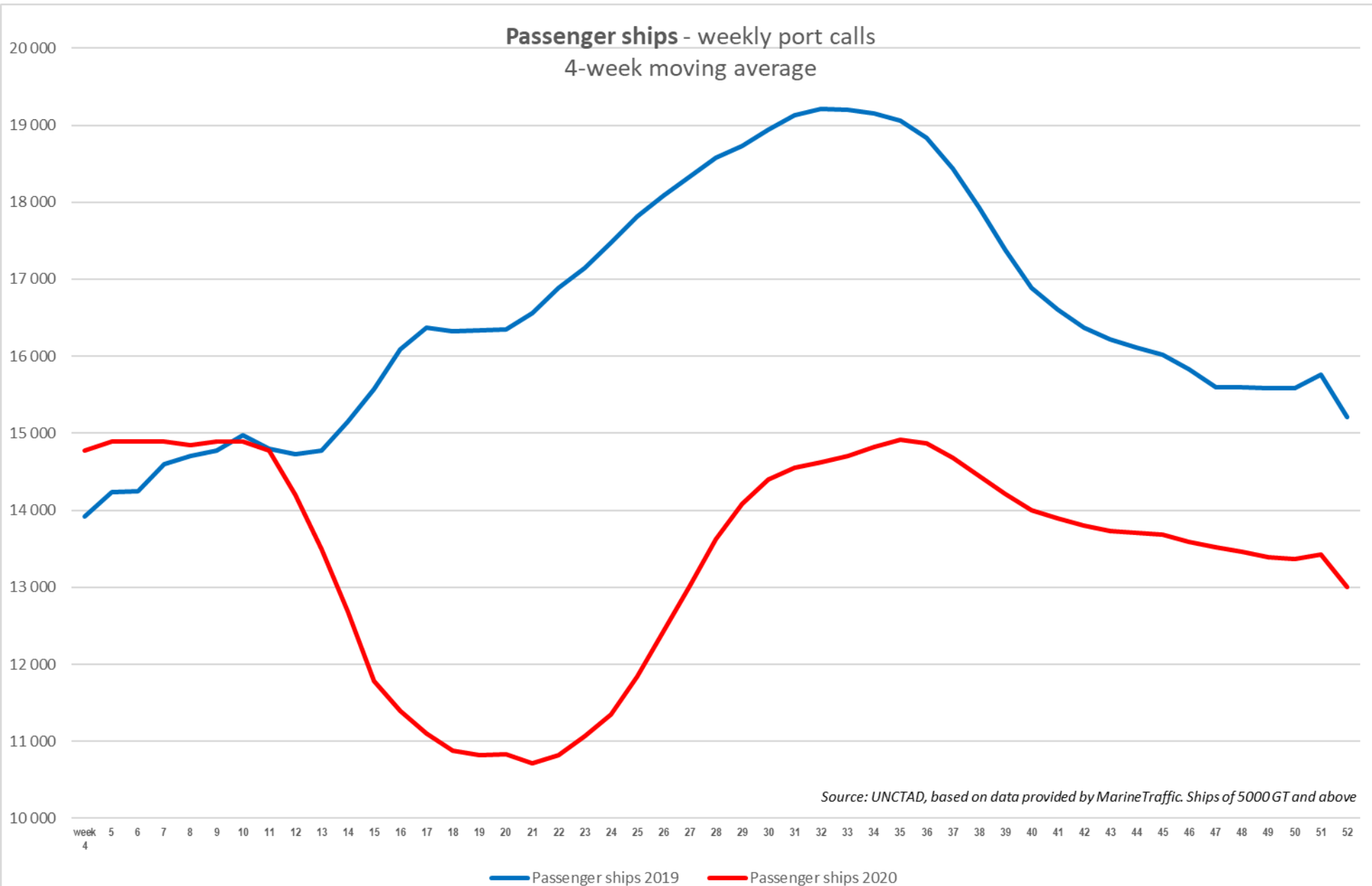
# Port calls: An update



Source: UNCTAD, based on data provided by MarineTraffic. Ships of 5000GT and above



**Passenger ships - weekly port calls**  
4-week moving average



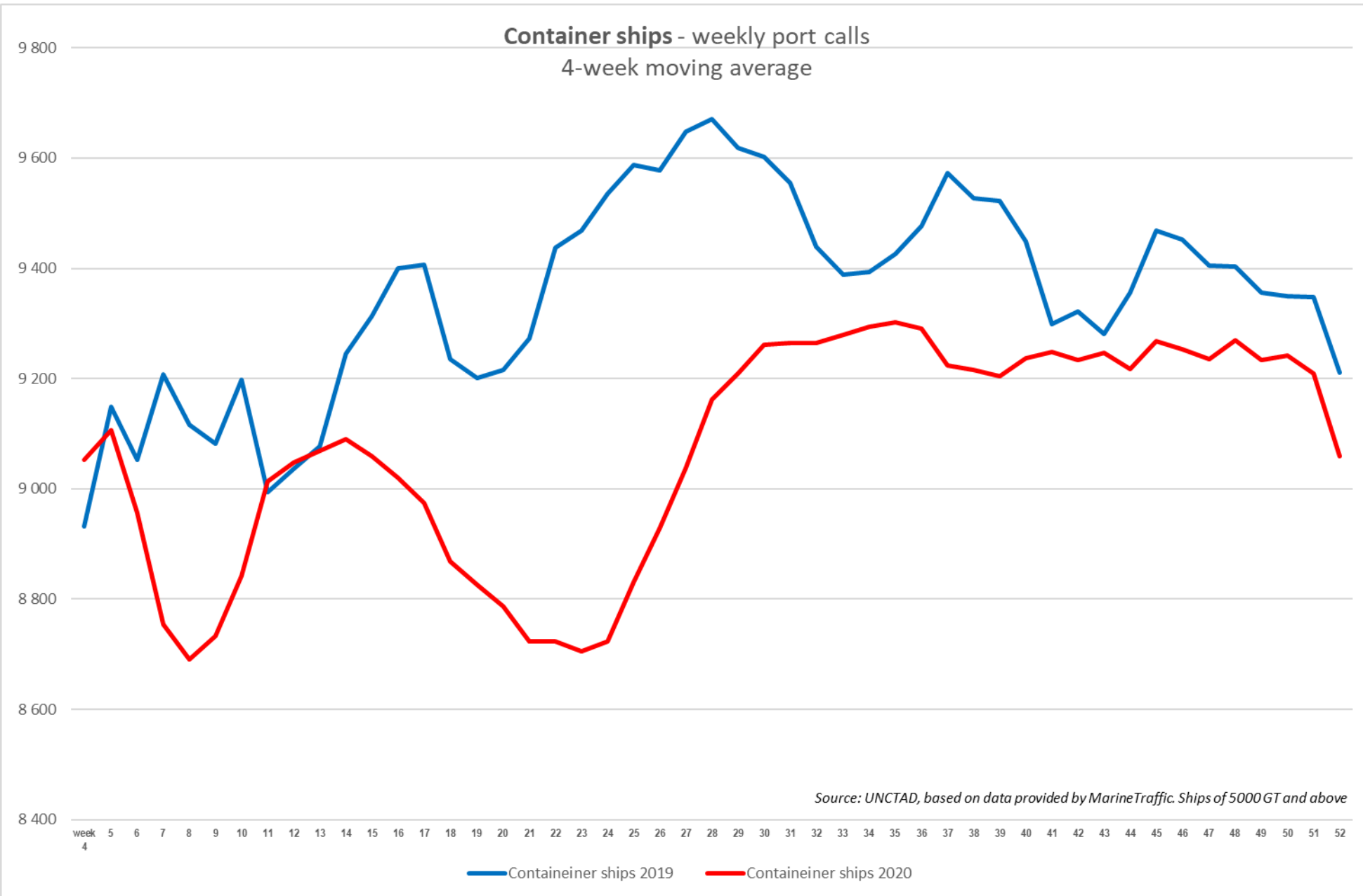
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## Port calls: An update

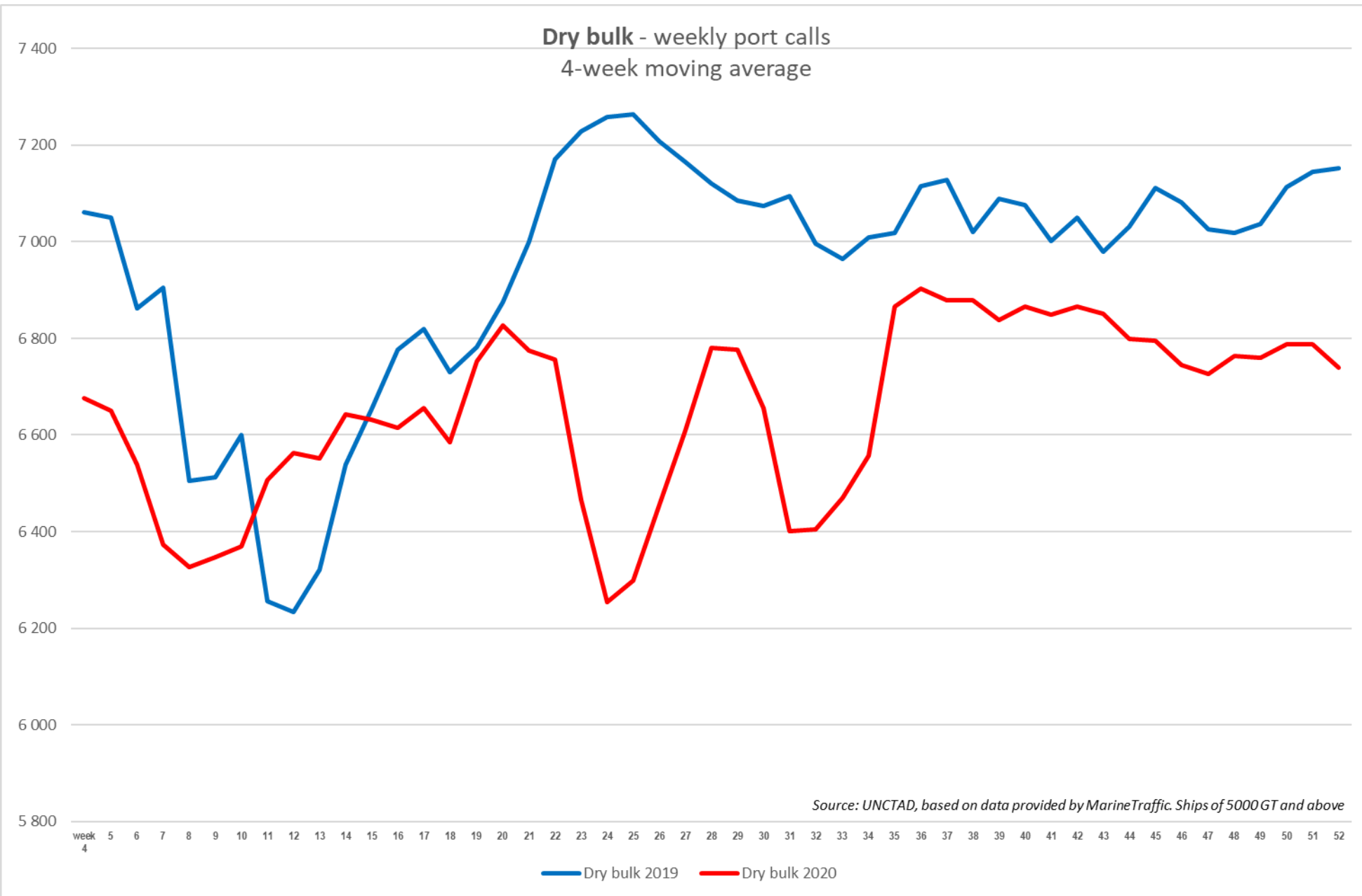


**Container ships - weekly port calls**  
4-week moving average

# Port calls: An update



# Port calls: An update





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**Trade**

1. **Support trade so it can effectively sustain economic and development.** Trade tensions, protectionism, export restrictions, particularly for essential goods in times of crisis, bring economic and social costs. These should, to the extent possible, be avoided. Further, non-tariff measures and other obstacles to trade should be addressed, including by stepping up trade facilitation action and customs automation.

**The economy**

2. **Help reshape globalization for sustainability and resilience.** Disruptions caused by the COVID-19 pandemic have re-ignited the debate on the risks associated with international manufacturing production and extended supply chains. It will be important to carefully assess the varied options when it comes to changes in supply-chain design and outcomes that are aligned with the Sustainable Development Goals and the 2030 Agenda for Sustainable Development. For example, a shortening of supply chains through re-shoring or near shoring may reduce transport costs and fuel consumption, but it does not necessarily future-proof supply chains against disruptions that could take place, regardless of the location. Multi-sourcing approaches may guarantee greater resilience than approaches that concentrate production in a single location, whether at home or abroad. The debate on globalization should focus on identifying ways in which unsustainable globalization patterns could be mitigated to generate more value to

**Digitalization**

3. **Promote greater technology uptake and digitalization.** Policies should support a digital transformation that improves the resilience of supply chains and their supporting transportation networks. For maritime transport to play its role in linking global economies and supply chains, it should leverage the crisis by investing in technology and adopting solutions that meet the needs of the supply chains of the future and support resilience efforts. Digitalization can enable enhanced efficiencies, including energy efficiency, and productivity in transport (for example, smart ports and shipping). It should also help countries tap e-commerce capabilities and transport facilitation benefits that boost trade. For more impact, cybersecurity should be strengthened at all levels.

4. **Harness data for monitoring and policy responses.** The use of fast-evolving data capabilities can support efforts to forecast growth and monitor recovery trends. New sources of data and enhanced possibilities

emanating from digitalization provide ample opportunities to analyse and improve policies. The pandemic has highlighted the need for real-time data on ship movements, port traffic, as well as information on shipping schedules to generate early warning systems for economic growth and seaborne trade.

**Data**

**Resilience**

5. **Enable agile and resilient maritime transport systems.** There is a need to invest in risk management and emergency preparedness beyond port operations, proofing the maritime supply chain and risk management require greater visibility of door-to-door transport operations. To do so, it is necessary to formulate plans setting out key actions and protocols to be implemented in response to crises while ensuring business continuity. Special consideration is needed to address seafarers' concerns, most of whom come from developing countries. Collaboration across port States and among different actors within countries remains key to improving crew changeover processes and ensuring standardized procedure and risk-

**Climate change**

6. **Maintain the momentum on sustainability, climate-change adaptation and resilience-building.** Current efforts to reduce greenhouse gas emissions from shipping and to promote energy transition away from fossil fuels should remain a priority. Governments could direct stimulus packages to support recovery while promoting other priorities such as climate-change mitigation and adaptation action. Thus, policies adopted in the context of a post-pandemic world should support further progress in the shipping industry's transition to greening and sustainability. Meanwhile, sustainability and resilience concerns, such as connectivity among small island developing States and climate-change adaptation, remain key priorities. In these States, critical coastal transport infrastructure is a lifeline for external trade, tourism, and food and energy security. The generation and dissemination of tailored data and information plays an important role in risk assessment, the improvement of connectivity levels, the development of effective adaptation measures, the preparation of targeted studies and effective multidisciplinary and multi-stakeholder collaboration. In addition, progress towards the realization of target 8.1 of the Sustainable Development Goals – sustainable economic growth in the least developed countries – is ever more important to strengthen the resilience of the least developed countries and their ability to cope with future disruptions.

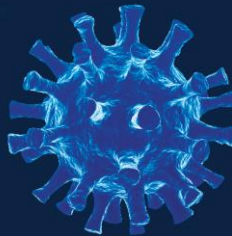
## Six policy actions to prepare for a post-pandemic world

There are six priority areas for policy action to be taken in response to the COVID-19 pandemic and the persistent challenges facing the maritime transport and trade of developing countries.



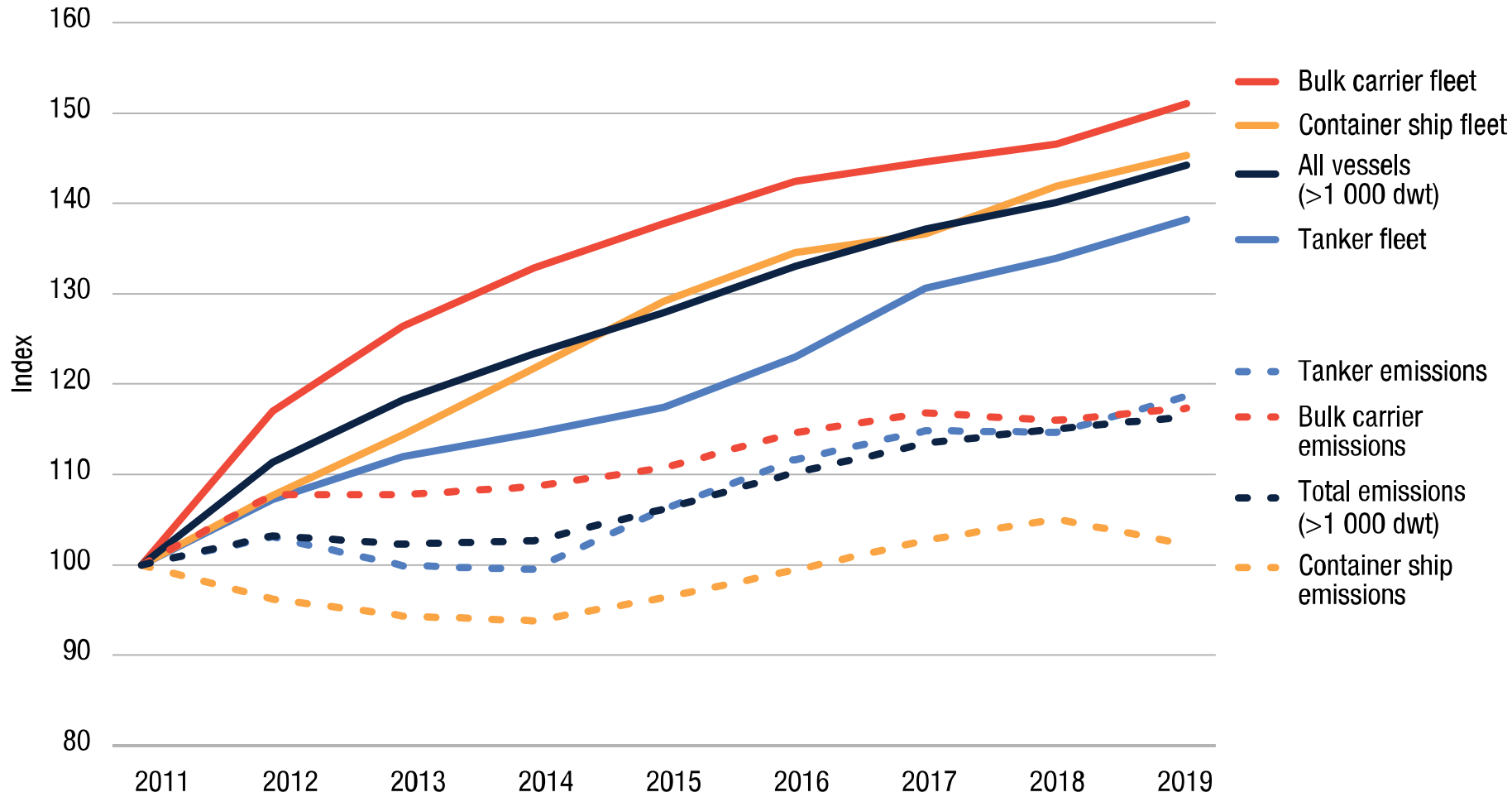
# REVIEW OF MARITIME TRANSPORT

## 2020



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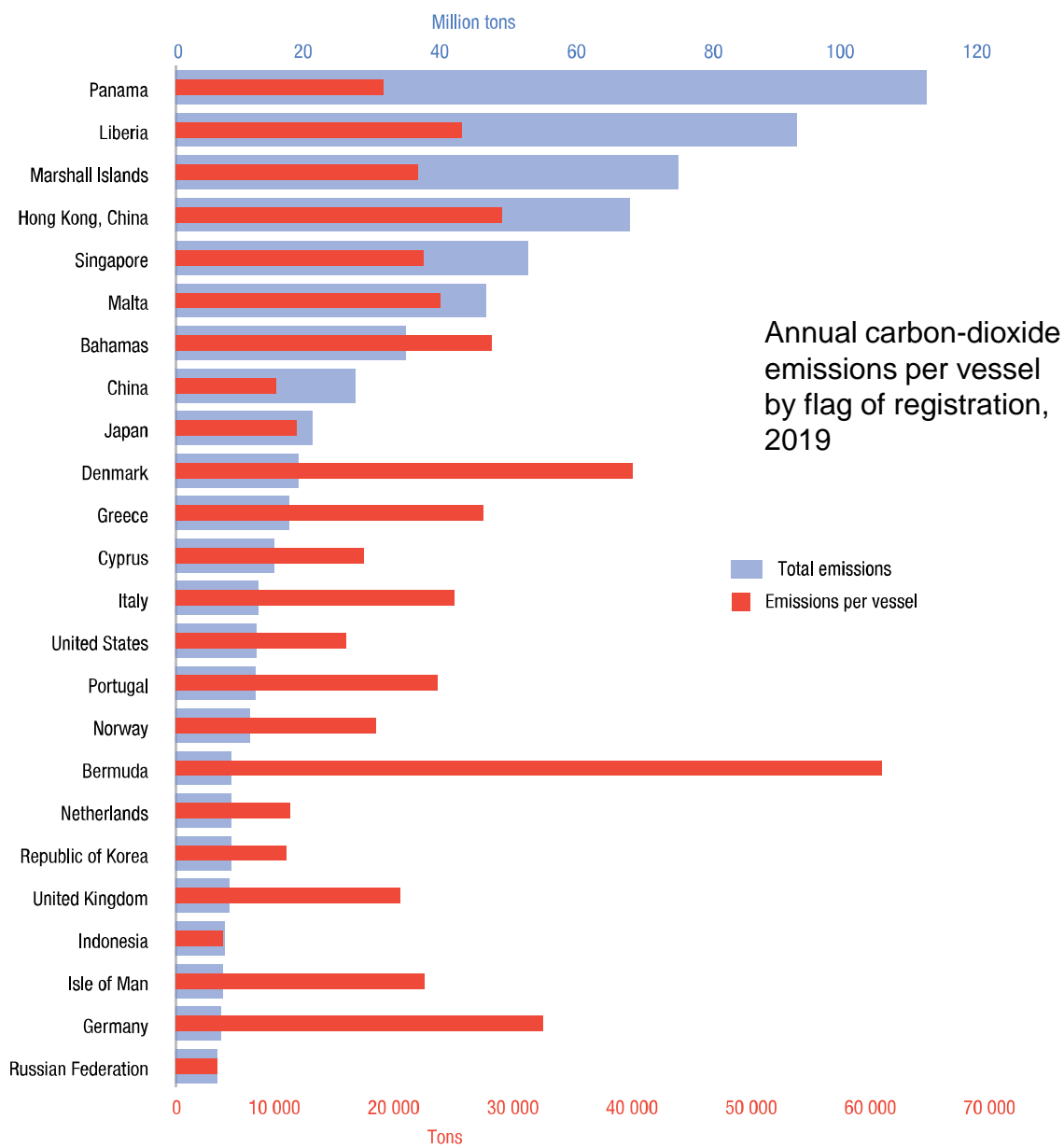
Figure 3.29 Comparison of dead-weight tonnage of respective fleet and carbon-dioxide emissions from bulk carriers, container ships and tankers, 2011–2019 (2011 = 100)



Source: UNCTAD, based on Marine Benchmark.

<http://unctad.org/RMT>



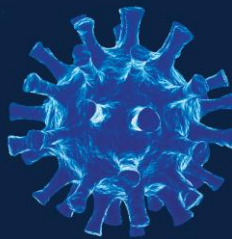


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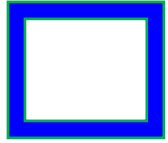
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Source: UNCTAD, based on Marine Benchmark.

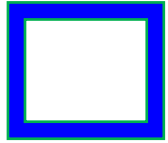
<http://unctad.org/RMT>

**MARINE  
BENCHMARK**

# Who leads the IT reforms in your company?



The CEO



The CTO



Covid-19

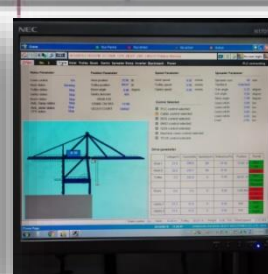
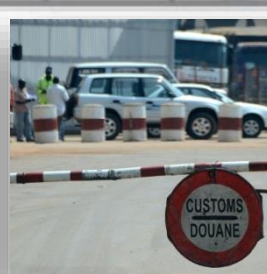
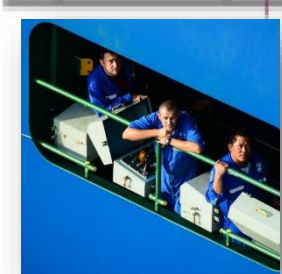
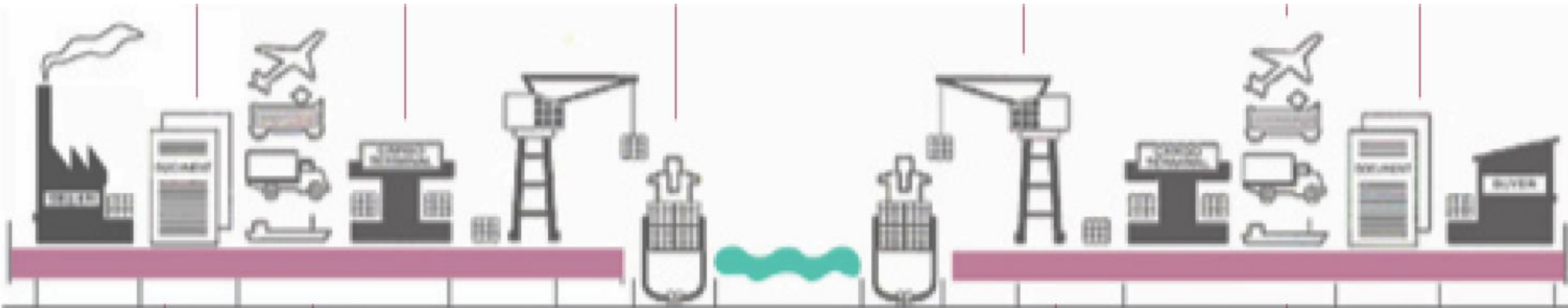




# Shipping in times of COVID19

A 10-point action plan

<https://unctad.org/en/pages/PublicationWebflyer.aspx?publicationid=2713>



# Is there a trade-off between controls and trade facilitation?



The concrete measures proposed in this policy brief help to facilitate transport and trade and to protect the population from COVID-19.

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**UNCTAD**

No. 79  
APRIL 2020

## POLICY BRIEF

### COVID-19: A 10-POINT ACTION PLAN TO STRENGTHEN INTERNATIONAL TRADE AND TRANSPORT FACILITATION IN TIMES OF PANDEMIC

The coronavirus disease (COVID-19) pandemic is substantially impacting people's lives and livelihoods and putting extreme stress on socioeconomic systems. International collaboration, coordination and solidarity among all is going to be key to overcoming this unprecedented global challenge. As part of efforts aimed at reducing the international spread of the virus and to mitigate the potentially crippling longer-term consequences of the pandemic, especially for the most vulnerable countries, policymakers need to take a number of measures to ensure the facilitation of international trade and the transport of goods. It is crucial to keep ships moving, ports open and cross-border and transit trade flowing, while ensuring that border agencies can safely undertake all necessary controls.

**Key points**

- There is a need to keep ships moving, ports open and cross-border trade flowing, while ensuring that border agencies can safely undertake all necessary controls.
- Facilitating trade and the transport of goods has become more important than ever to avoid economic collapse and critical supply chain disruptions.
- The concrete measures proposed in this policy brief help to facilitate transport and trade and to protect the population from COVID-19.

**Challenges for international trade logistics\***

Border agencies face the challenge of expediting imports, exports and transit, including of necessary medical supplies, donations and relief consignments, while ensuring epidemic prevention and providing adequate customs clearance and compliance controls of goods and transport personnel.

This challenge affects goods and services that are necessary for the preservation of many jobs in manufacturing, on which modern society depends. Particular efforts need to be made on the part of Governments to secure and enhance the production and distribution of critical goods needed to contain and combat the pandemic (such as medical supplies and equipment) and to secure basic needs (including food and energy). Relevant service providers and the supporting infrastructure need to be protected as a matter of priority. This includes ensuring that transport services, ports and border agencies not only remain operational, but are effectively strengthened to cope with the exceptional challenges they face.

Governments need to adopt common approaches to addressing these issues across the global network of supply chains to avoid widespread disruptions. In the absence of urgent action in this regard, the post-pandemic economic recovery may be severely hampered, potentially worsening long-term sustainable development prospects, particularly for the world's poorest and most vulnerable.

International cooperation on these points is vital, as protectionism may significantly exacerbate the global health crisis and delay a post-pandemic economic recovery. Effective collaboration, coordination and cooperation among public and private stakeholders at all levels will also be key.

\* Note: All websites referred to in this document were accessed in April 2020.



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