

UNITED NATIONS CONFERENCE ON TRADE AND DEVELOPMENT

REVIEW
OF MARITIME
TRANSPORT

2022

Navigating
stormy waters



Maritime transport for sustainable development: Key insights from RMT 2022

Key developments in seaborne trade, maritime and port business, including key performance indicators



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The RMT package

1. Maritime transport demand (trade and the economic outlook)
2. Maritime transport supply (shipping and port services)
3. Freight rates
4. Key performance indicators
5. Maritime Trade Facilitation
6. Consolidation and competition in container shipping
7. Legal issues and regulatory developments



The image shows a screenshot of the UNCTADSTAT website. At the top, the UNCTADSTAT logo is displayed with the tagline 'UNITED NATIONS CONFERENCE ON TRADE AND DEVELOPMENT'. Below the logo, there is a search bar and a list of maritime statistics. The statistics include:

- Merchant fleet by flag of registration and by type of ship, annual
- Share of the world merchant fleet value by flag of registration, annual
- Merchant fleet by country of beneficial ownership, annual
- Share of the world merchant fleet value by country of beneficial ownership, annual
- Ship recycling, by country, annual
- Ships built by country of building, annual
- Seafarer supply, quinquennial, 2015 and 2021
- Liner shipping connectivity index, quarterly
- Liner shipping bilateral connectivity index, quarterly
- Container port throughput, annual
- Port liner shipping connectivity index, quarterly
- Port call and performance statistics: time spent in ports, vessel age and size, annual
- Port call and performance statistics: time spent in ports, vessel age and size, semi-annual
- Port call and performance statistics: number of port calls, annual
- Port call and performance statistics: number of port calls, semi-annual
- World seaborne trade by types of cargo and by group of economies, annual

Below the list, there is a 'Maritime Profile: Thailand' dashboard. The dashboard is titled 'MARITIME PROFILE: THAILAND' and features a navigation menu with 'ABOUT', 'DATA', 'COUNTRY PROFILES', and 'DATA EXPLORATION'. The dashboard displays general information for 2021, including:

- Population: 71,601 Millions
- Land area²: (a) 510 890 Km²
- GDP: 504 491 Millions current US\$
- GDP growth: 0.95 %
- Merchandise trade¹: 538 888 Millions current US\$
- Transport services trade¹: 90 003 Millions current US\$

The dashboard also displays maritime key figures for 2021:

- Coast/area ratio²: 13.8 m/km²
- Fleet - National flag⁵: 6 059 Thousands DWT
- Container port throughput⁷: 10 213 905 TEU
- Ship building⁴: 0.000 GT
- Fleet - National flag⁵: 846 ships
- Number of seafarers⁶: (1) 15 682
- Ship recycling⁴: 0.000 GT
- Fleet - Ownership⁶: 5 049 Thousands DWT
- Number of port calls⁸: 29 505

At the bottom of the dashboard, there is a section for 'WORLD SHARES FOR 2021'. To the right of the dashboard, there is a book cover titled 'MARITIME TRADE DISRUPTED: THE WAR IN UKRAINE AND ITS EFFECTS ON MARITIME TRADE LOGISTICS', dated 28 June 2022, published by UNCTAD.

Maritime trade recovered in 2021 but is projected to slow down



Source: UNCTAD secretariat, based on UNCTADstat data and Review of Maritime Transport, various issues.

Note: Data for 2022 are projections and for 2023 to 2027 are forecasts.

Trends shaping the outlook

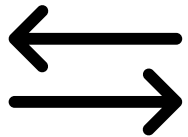
Navigating the path to normalization: Selected scenarios



Preparing better for future challenges



Support growth



Enable trade



Supply constrained and disrupted

Port congestion

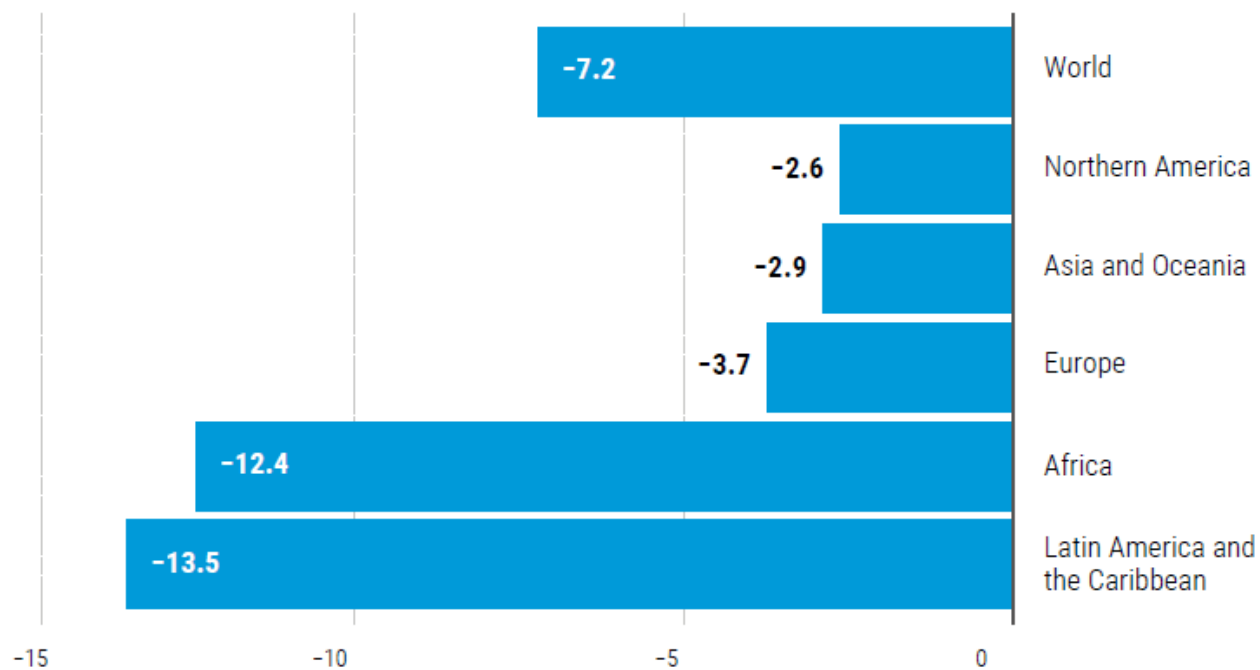
Inland logistics shortages

Tight shipping availability



Congestion impacted port calls and time spent in port

Figure 4.19 Changes in direct calls by region, from 2020Q3 to 2022Q2, per cent



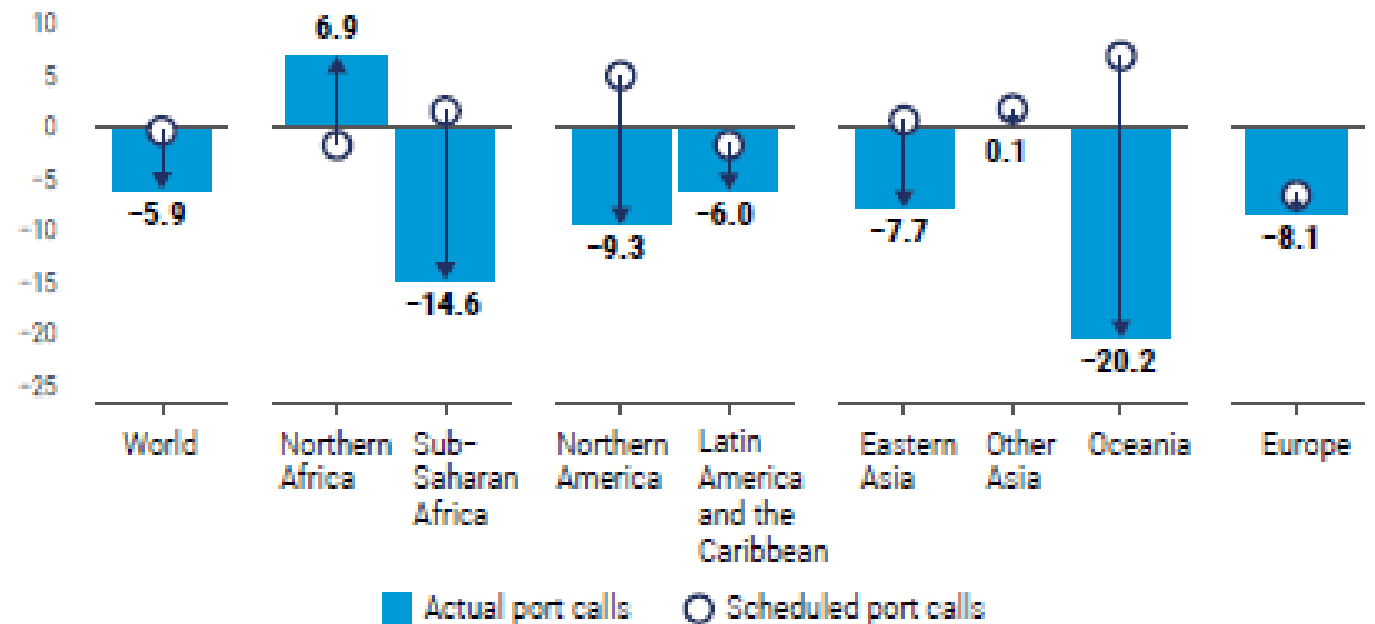
Source: UNCTAD, based on data provided by MDS Transmodal.

| 2021 Vessel type | Median time in port (days) | Median time in port, annual change (%) |
|------------------------|----------------------------|--|
| Container ships | 0.80 | 13.7 |
| Dry breakbulk carriers | 1.17 | 2.1 |
| Dry bulk carriers | 2.11 | 2.3 |
| LNG carriers | 1.13 | 0.9 |
| LPG carriers | 1.03 | -1.5 |
| Liquid bulk carriers | 0.98 | 1.3 |
| All ships | 1.05 | 4.8 |

Source: UNCTAD based on data provided by MarineTraffic

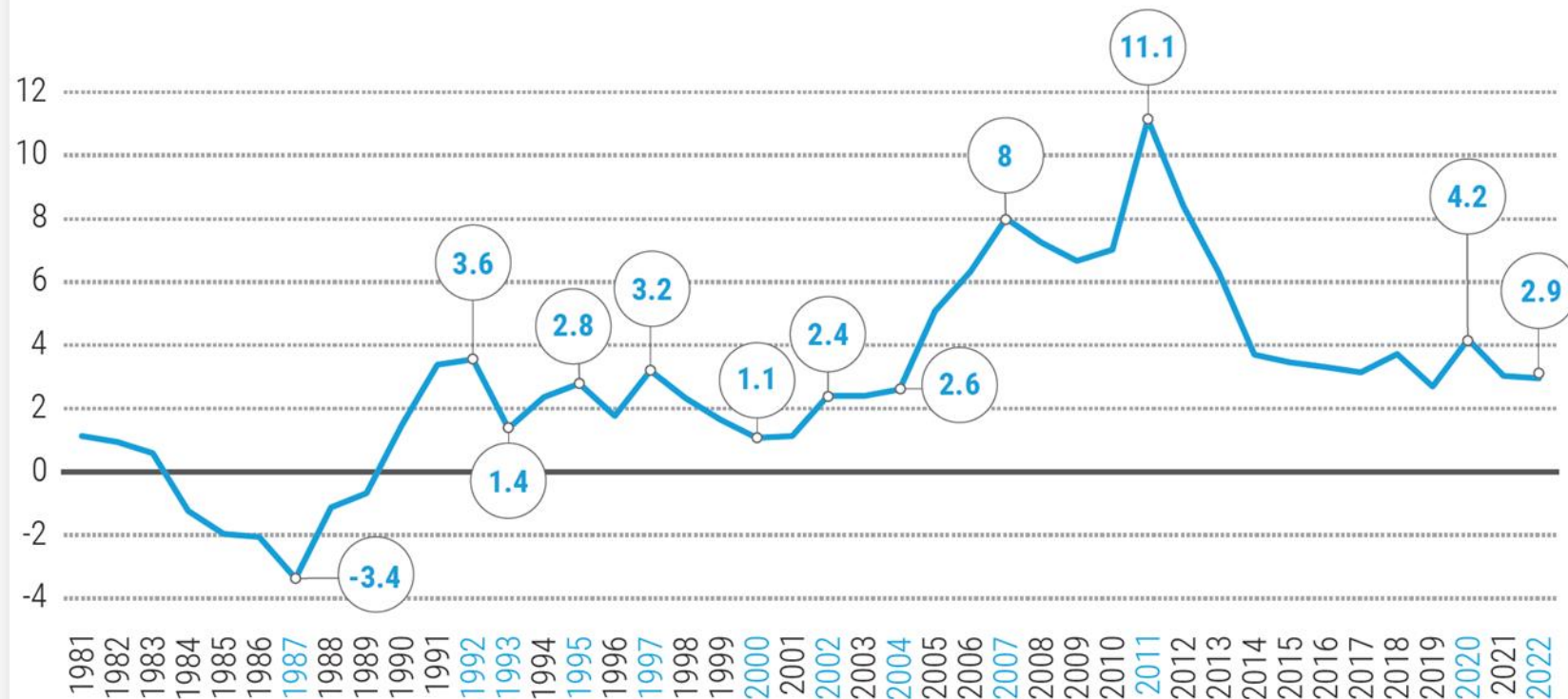
Less reliable services

Figure 4.5 Changes in actual and scheduled port calls of container ships from 2019 to 2021, per cent



Trade recovery constrained: low fleet growth

Figure 2.1 Annual growth of the world fleet, 1981–2022
(percentage of dead-weight tonnage)

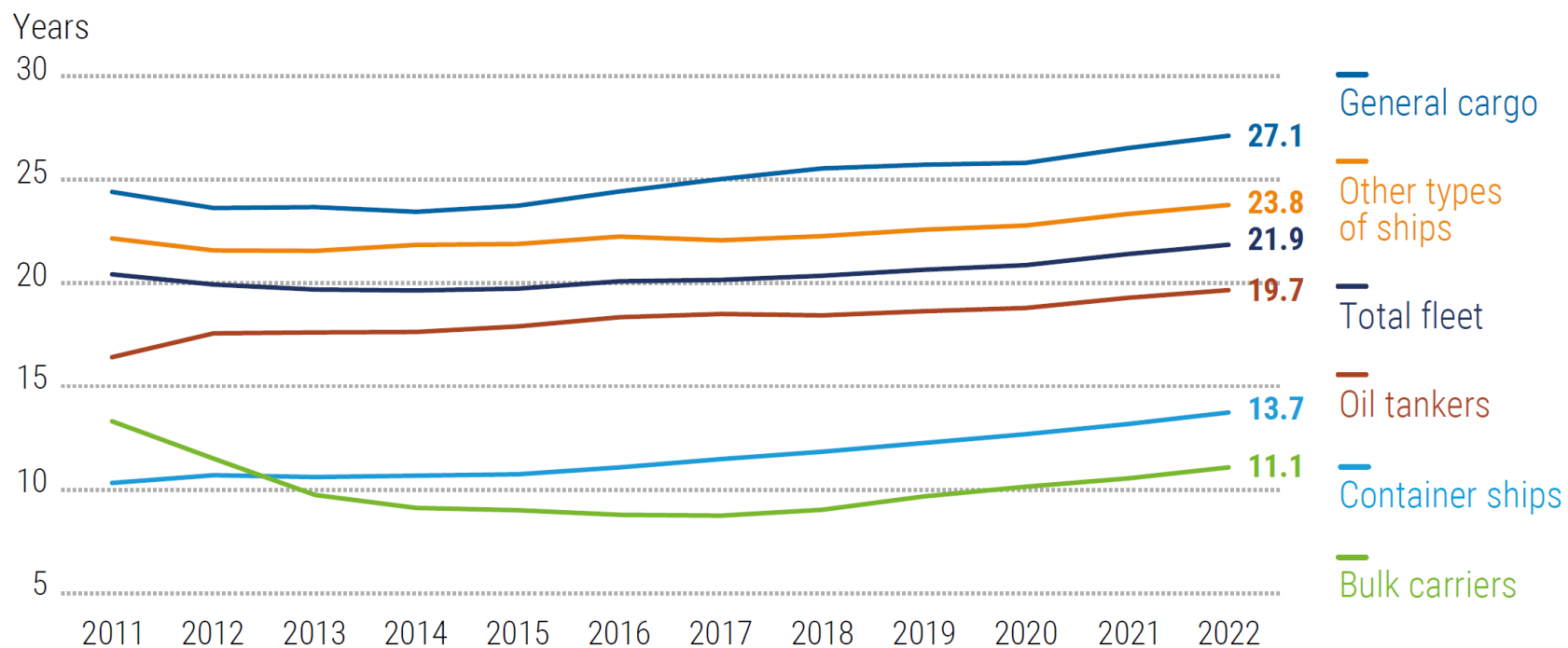


Source: UNCTAD calculations, based on data from Clarksons Research.

Note: Propelled seagoing vessels of 100 gross tons and above, as of 1 January 2022.

Challenges ahead: Ageing ships

Figure 2.2 Average age of merchant fleet, 2011–2022



Source: UNCTAD calculations, based on data from Clarksons Research.

Note: Propelled seagoing vessels of 100 gross tons and above, as of 1 January 2022.

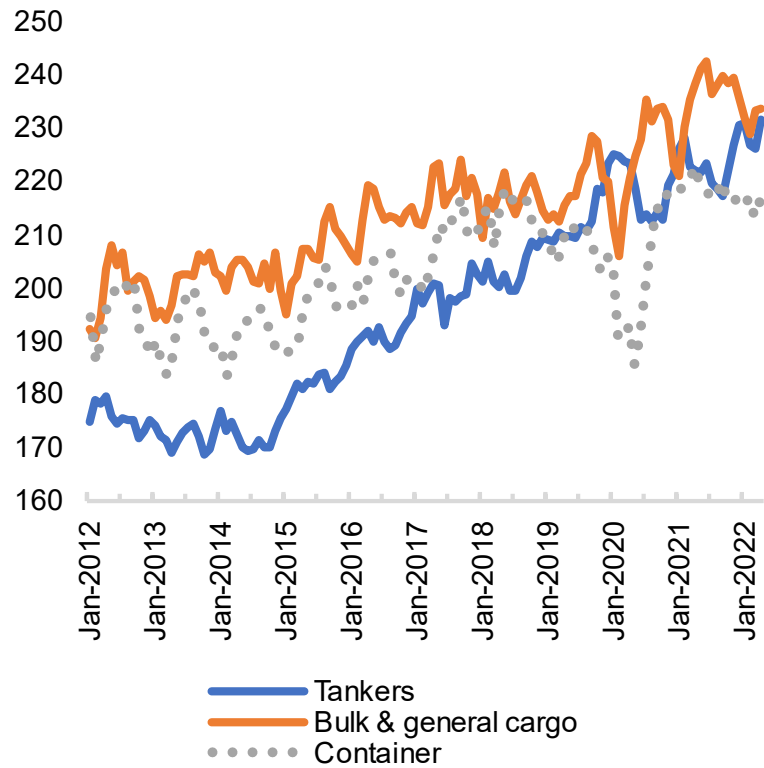
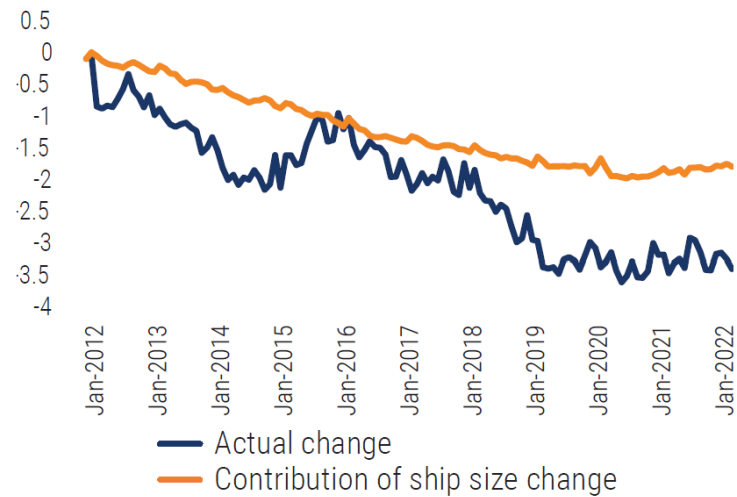


Figure 4.34 Cumulative change from January 2012 in CO₂ emission intensity, and contribution of ship size change of container ships, grams per ton-mile

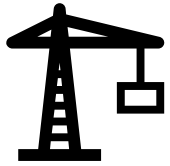


Between 2020 and 2021 total emissions increased by 4.7%



Source: UNCTAD, based on data provided by Marine Benchmark.

Preparing better for future challenges



Tackle supply-side infrastructure and services constraints



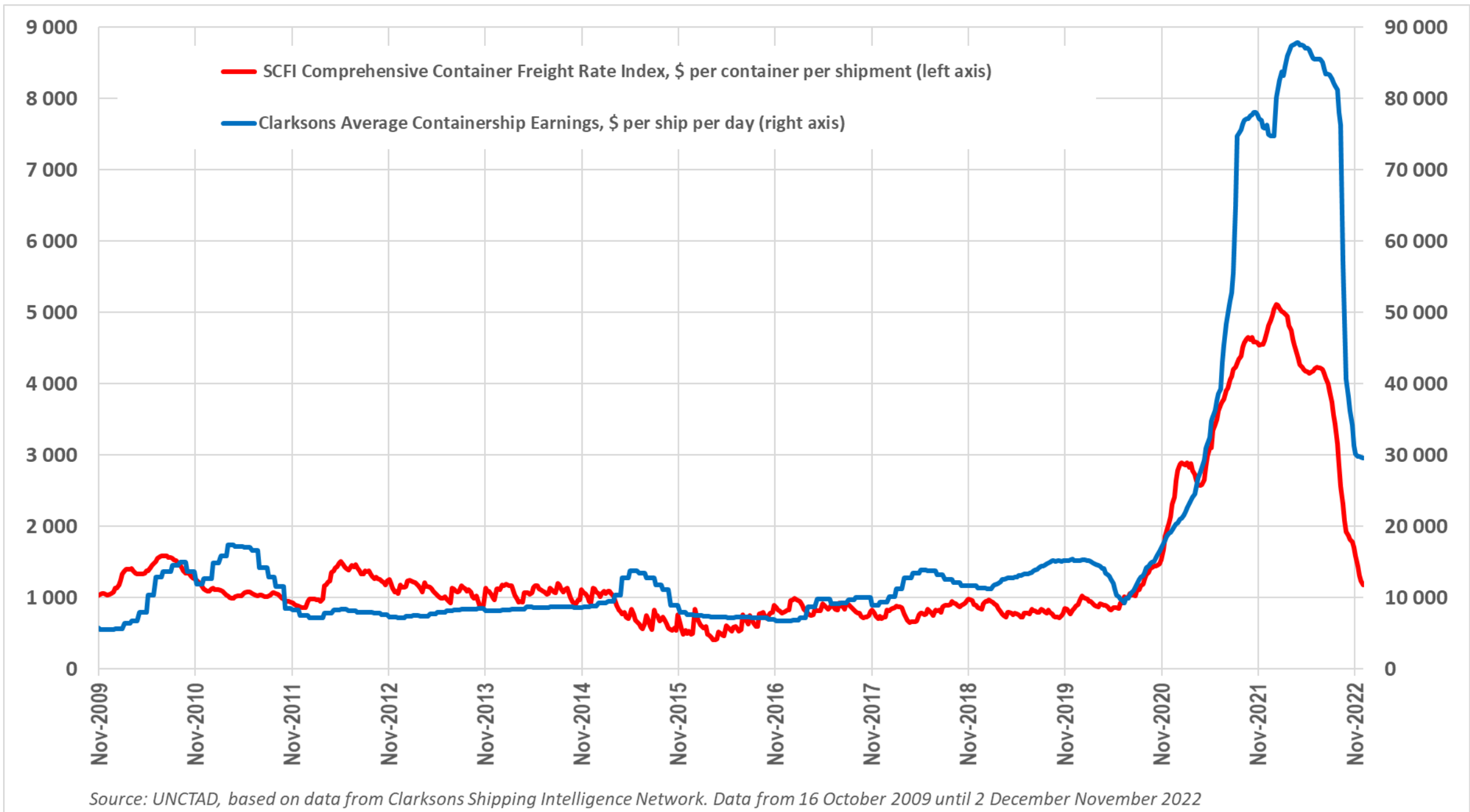
Move to a clean energy and low-emissions future



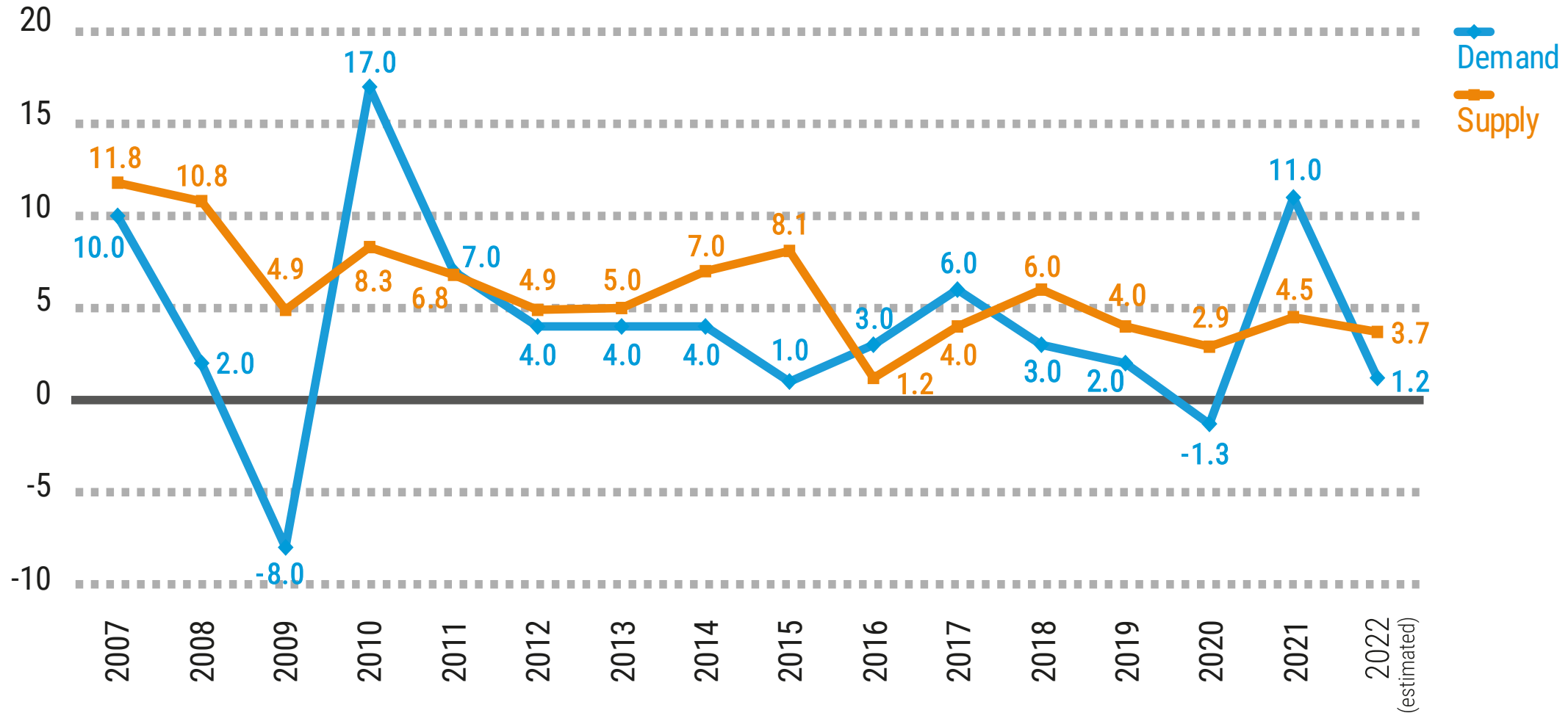
UNITED NATIONS
UNCTAD

Predictability
for investment



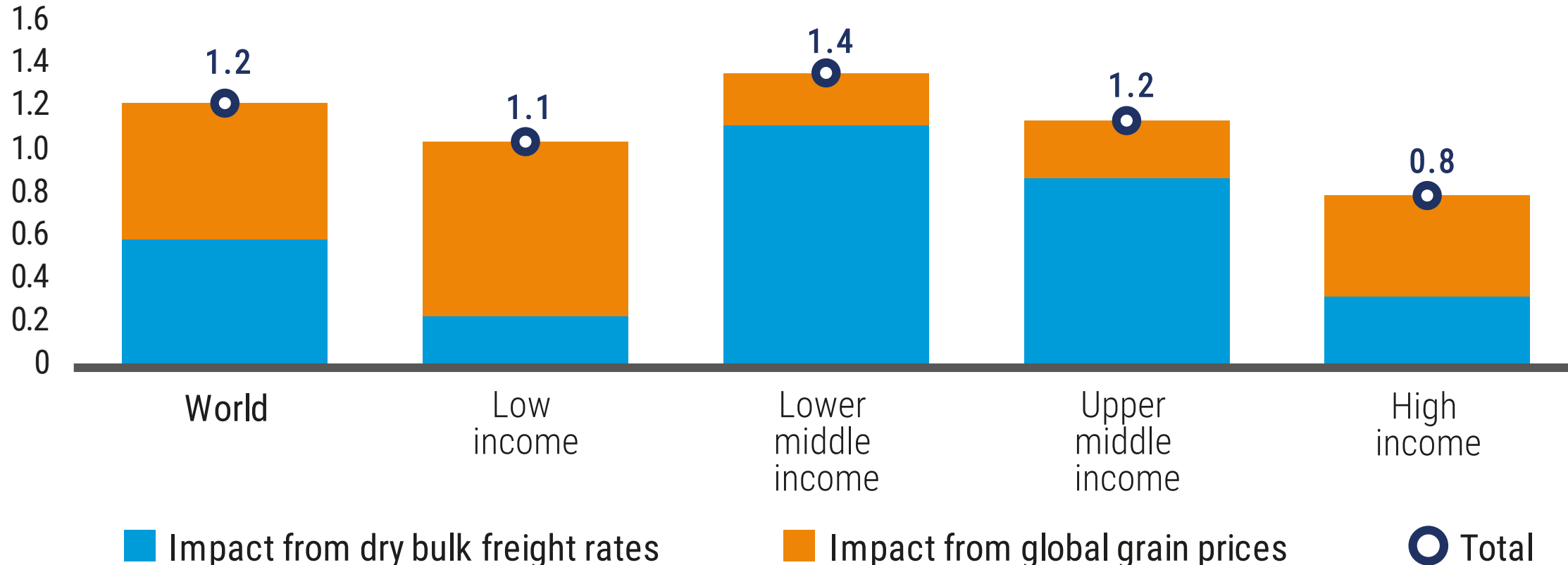


Growth of demand and supply in container shipping, 2007–2022, percentage change

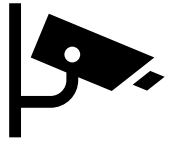


Impact of higher **dry bulk** freight rates and global grain prices on consumer food prices, selected country groups

(percentage)



Preparing better for future challenges



Monitoring freight rates and charges



Support the most vulnerable



In conclusion, the year in review:



MARITIME SUPPLY
CHAINS CRUCIAL



DISRUPTION
AFFECTING EVERYONE



WE NEED TO BE
BETTER PREPARED

Thank you!

- **Download the report:**
 - <http://unctad.org/rmt>
- **Access our data:**
 - <http://stats.unctad.org/Maritime>
- **Contact us:**
 - rmt@unctad.org

