4: Globalized production of "maritime transport"

Financial and other services: UK, Scandinavia
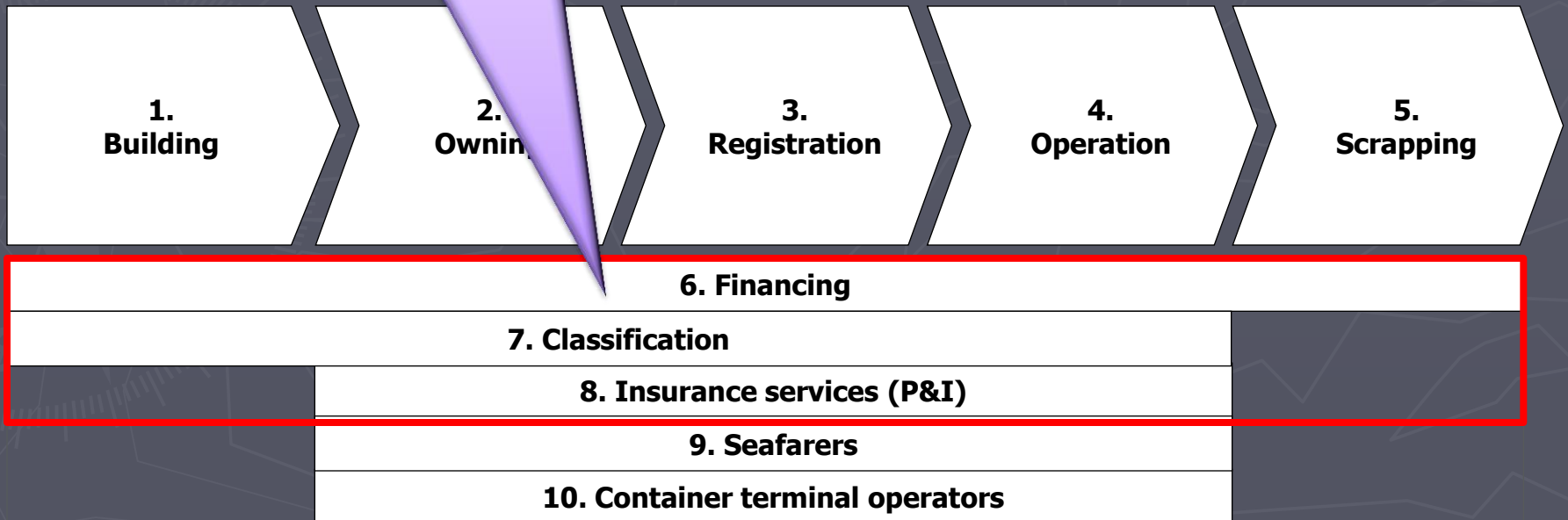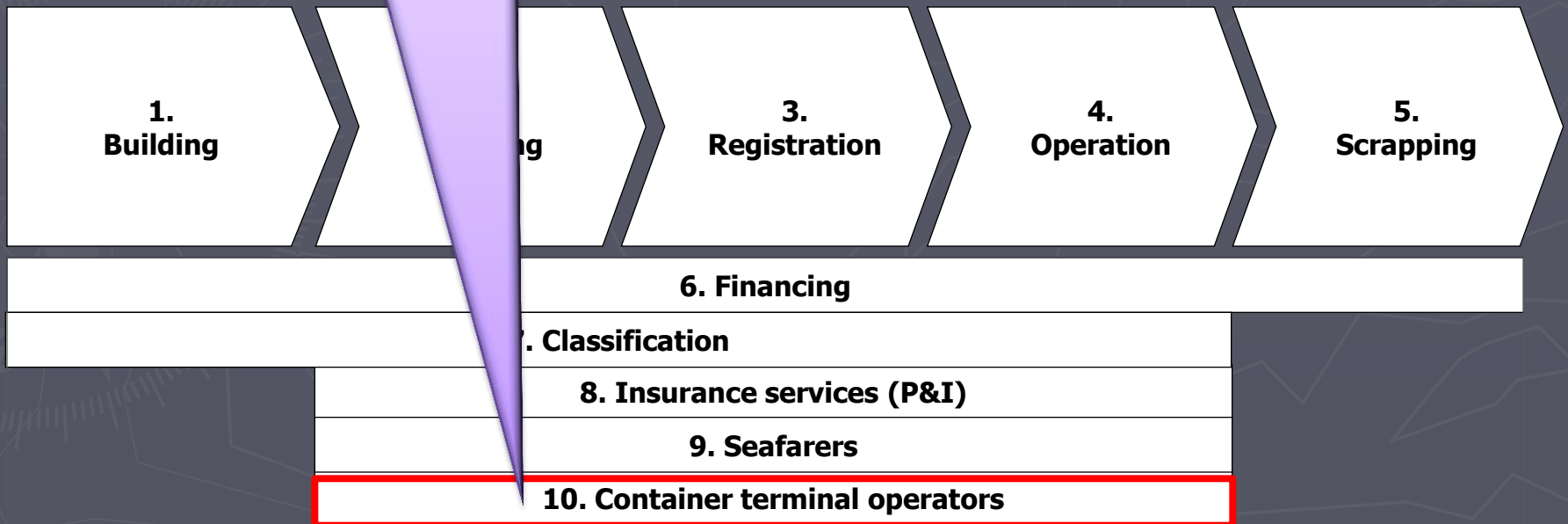
1. Building	2. Ownin...	3. Registration	4. Operation	5. Scrapping

6. Financing
7. Classification
8. Insurance services (P&I)
9. Seafarers
10. Container terminal operators

4: Globalized production of "maritime transport"
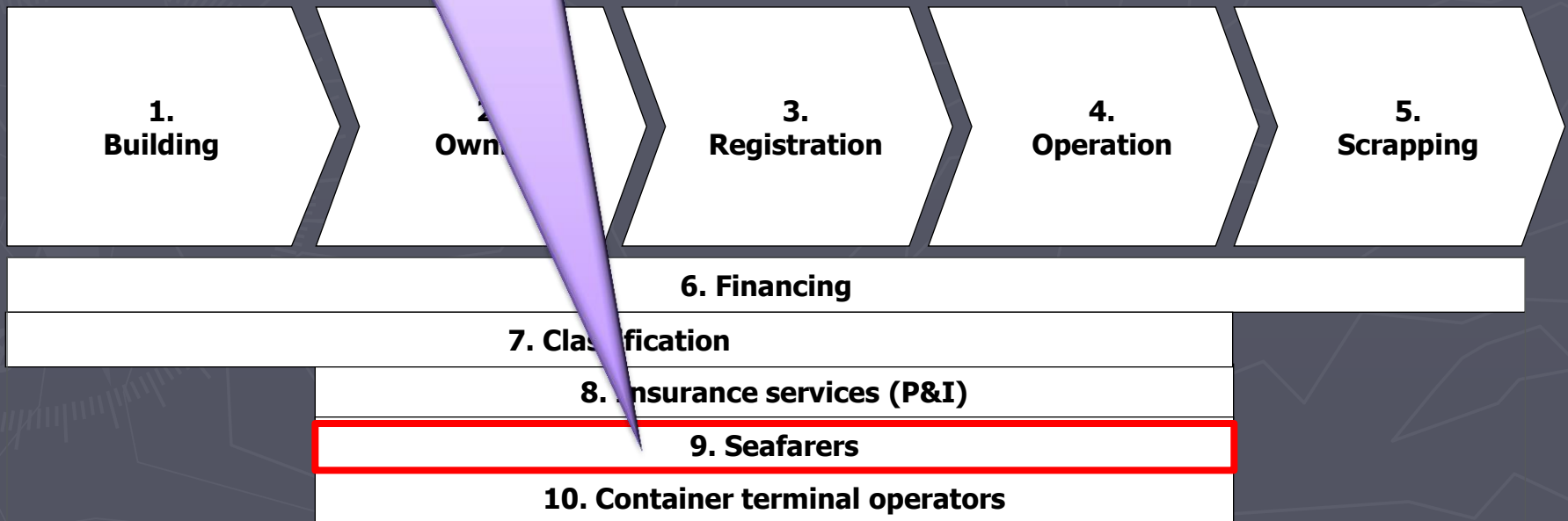
4: Globalized production of "maritime transport"

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

1. Building	2. ...ng	3. Registration	4. Operation	5. Scrapping

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UNCTAD Maritime Country Profiles
stats.unctad.org/MARITIME

Greece

WORLD SHARES FOR 2014

Population	0.15 %
Gross Domestic Product (current US$)	0.30 %
Merchandise exports (US$)	0.19 %
Merchandise imports (US$)	0.33 %
Coastline (km) (2)	0.93 %
National flagged fleet (DWT) (4)	4.57 %
Fleet ownership (DWT) (5)	15.41 %
Container port throughtput (TEU)	0.57 %
Ship building (GT) (3)	
Ship scrapping (GT) (3)	

India

WORLD SHARES FOR 2014

Population	17.83
Gross Domestic Product (current US$)	2.63
Merchandise exports (US$)	1.69
Merchandise imports (US$)	2.44
Coastline (km) (2)	1.05
National flagged fleet (DWT) (4)	0.91
Fleet ownership (DWT) (5)	1.30
Container port throughtput (TEU)	1.70
Ship building (GT) (3)	0.15
Ship scrapping (GT) (3)	31.69

Liberia

WORLD SHARES FOR 2014

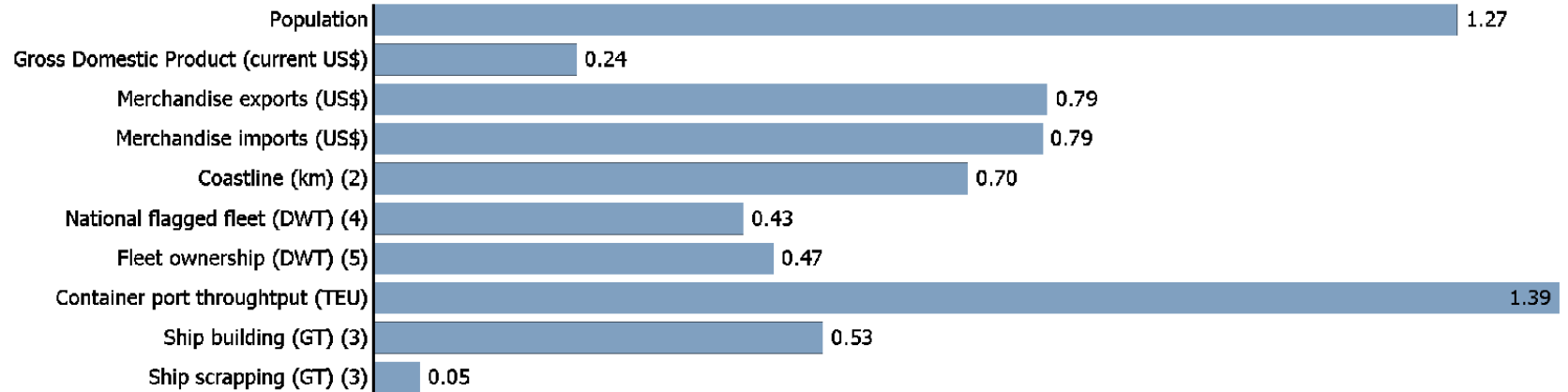|	
Population	0.06 %
Gross Domestic Product (current US$)	Less than 0.01% of the World total
Merchandise exports (US$)	Less than 0.01% of the World total
Merchandise imports (US$)	0.01 %
Coastline (km) (2)	0.05 %
National flagged fleet (DWT) (4)	12.13 %
Fleet ownership (DWT) (5)	Less than 0.01% of the World total
Container port throughtput (TEU)	
Ship building (GT) (3)	
Ship scrapping (GT) (3)	

Republic of Korea

WORLD SHARES FOR 2014

Population	0.69
Gross Domestic Product (current US$)	1.81
Merchandise exports (US$)	3.01
Merchandise imports (US$)	2.77
Coastline (km) (2)	0.76
National flagged fleet (DWT) (4)	1.03
Fleet ownership (DWT) (5)	4.60
Container port throughtput (TEU)	3.48
Ship building (GT) (3)	34.36
Ship scrapping (GT) (3)	0.02

Viet Nam

UNCTAD Maritime Country Profiles
stats.unctad.org/MARITIME

✓ 4: Globalized production of "maritime transport"

1. Building	2. Owning	3. Registration	4. Operation	5. Scrapping

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10. Container terminal operators

5: Industry consolidation
(the other side of the same coin)

►As countries specialize…

►Industry sees a process of <u>concentration</u>
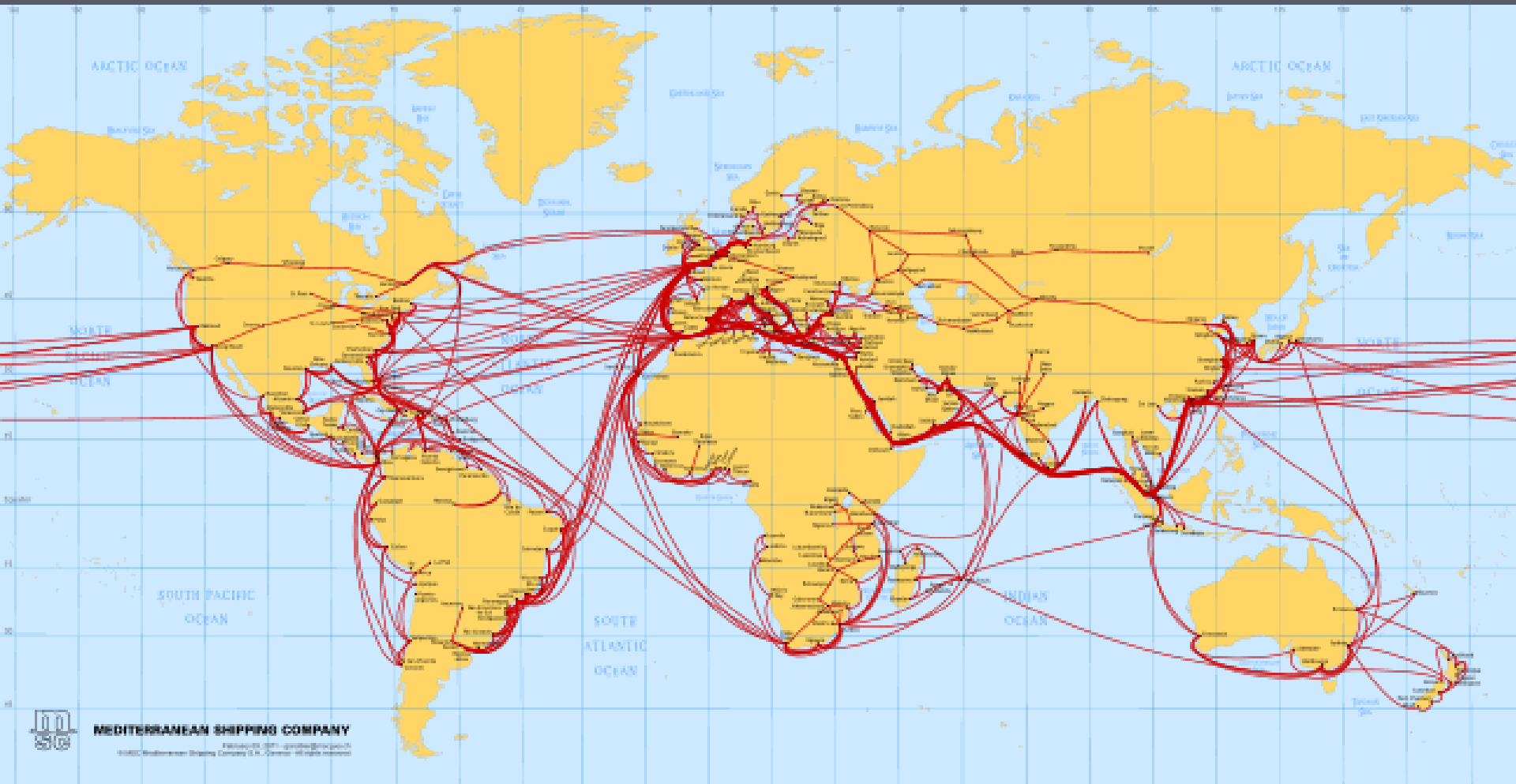
5 (cont.): Ships keep <u>growing</u>

► MSC, China Shipping:
Container ships
20 000+TEU

► Vale:
Dry bulk
402 347 dwt

► Wilhelm Wilhelmsen:
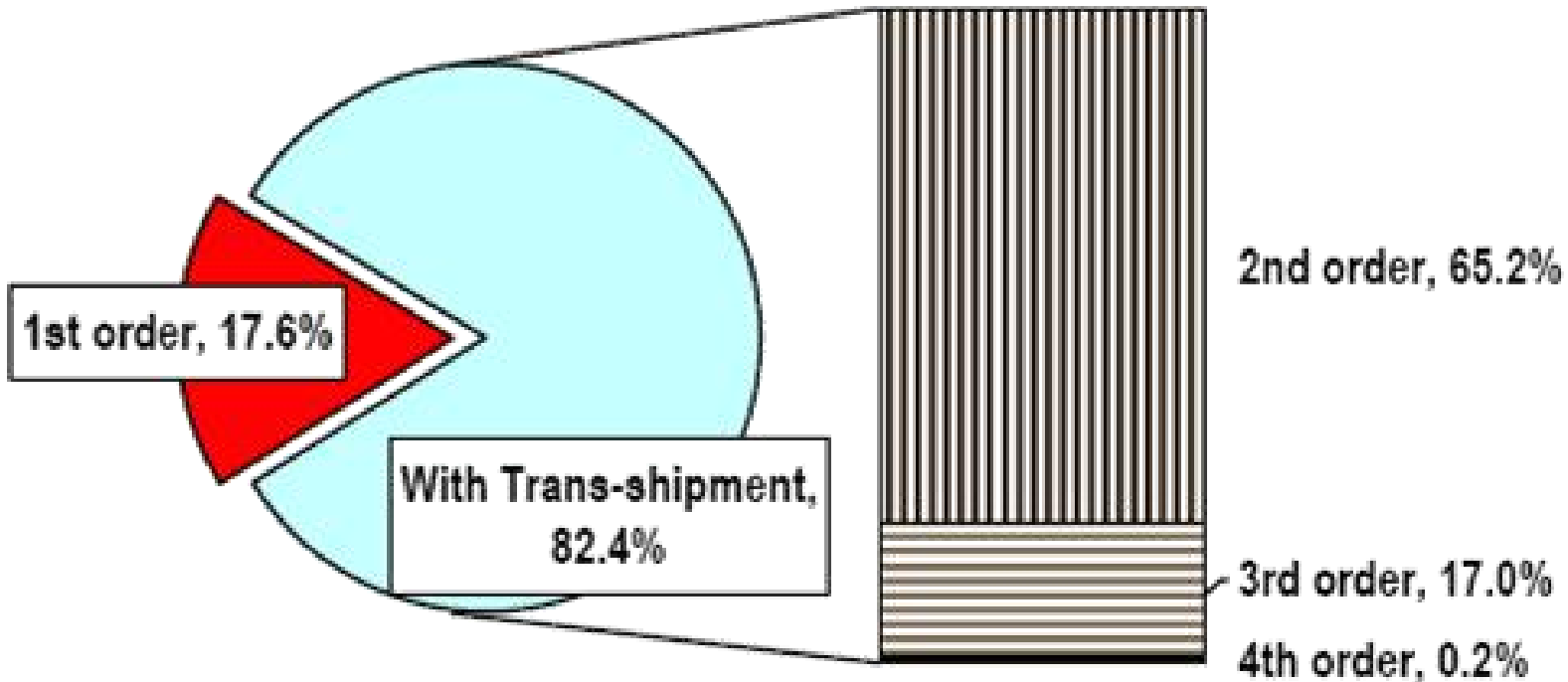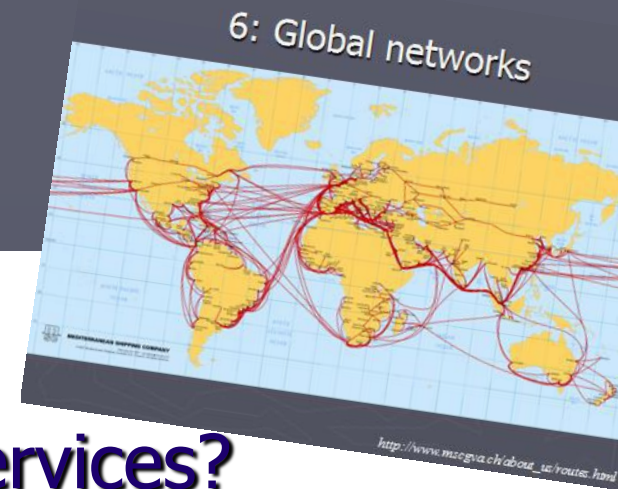ro-ro
265 m

6: Global networks

Networking

Out of 162 x 161 pairs of countries:

How many are connected by direct services?

1st order, 17.6%

With Trans-shipment, 82.4%

2nd order, 65.2%

3rd order, 17.0%

4th order, 0.2%

Source: UNCTAD, based on data from Containerization International

National Rail

Transport for London
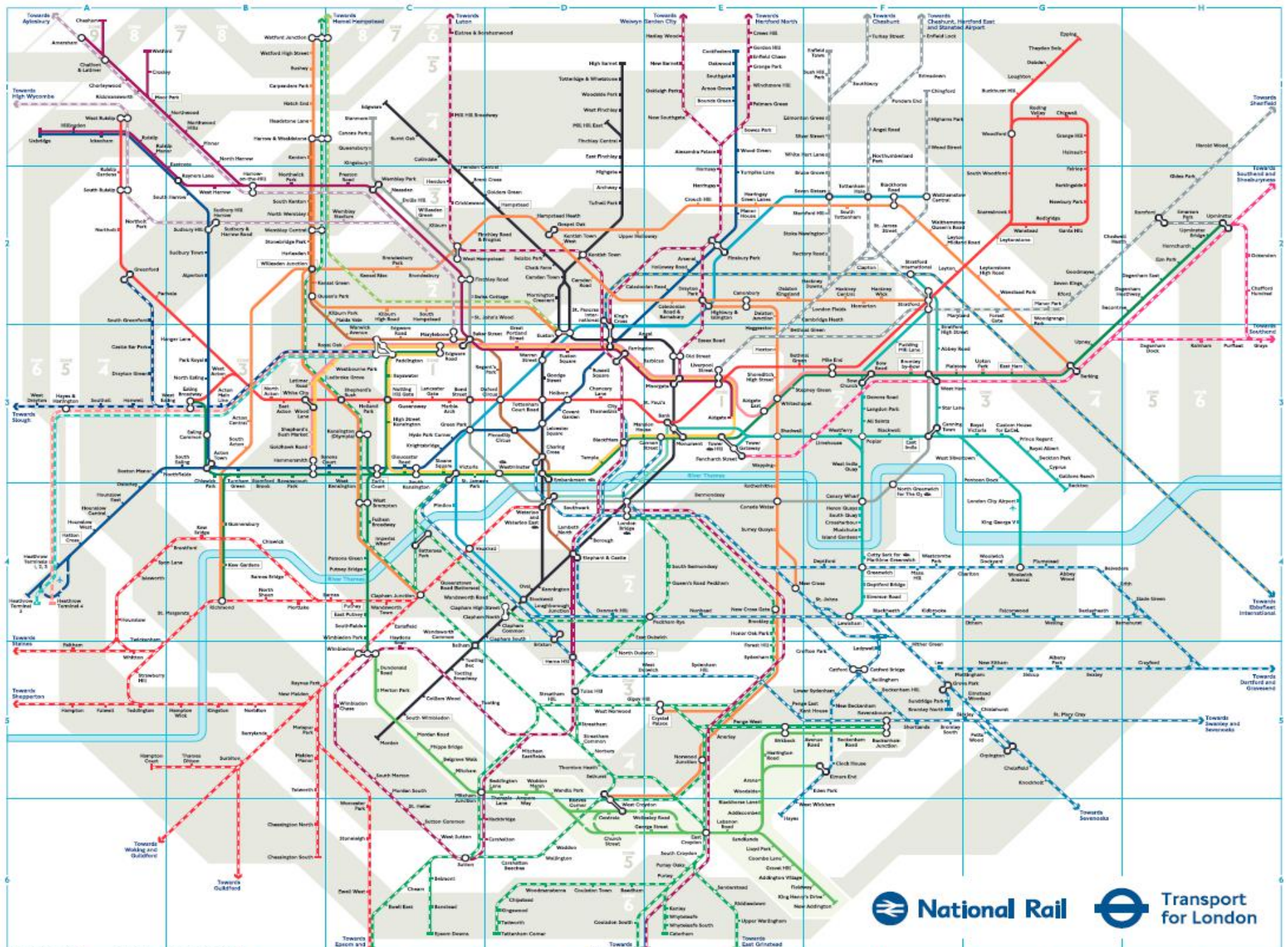
- ✓ Demand
- ✓ Supply
- ▶ Markets
- ▶ The Future

4: Globalized production of "maritime transport"

5: Industry consolidation
(the other side of the same coin)
- ▶ As countries specialize...
- ▶ Different industry sectors see a process of concentration

6: Global networks

http://www.mscgva.ch/about_us/routes.h

✓ Demand

✓ Supply

▶ Markets

▶ The Future

7: Liberalized markets

► Less cargo reservation

► Fewer liner conferences (cartels)

► More private sector participation

8: (somewhat) lower freight costs

Freight costs in % of goods' value

	1980s	1990s	2000s
Developing Africa	12.3	12.1	10.6
Developing Oceania	11.6	12.0	9.5
Developing America	8.3	8.3	8.2
Developing Asia	8.9	8.4	7.4
Developed economies	7.4	7.3	6.4