

SHIPPING STATISTICS AND MARKET REVIEW 2021

Volume 65 - No. 2



Analytical Focus

- World Merchant Fleet
- **World Tanker Market**
- World Bulk Carrier Market
- World Container Shipping
- World General Cargo and Ro-Ro Shipping
- World Passenger and Cruise Shipping
- World Shipbuilding and Shipbuilders
- Major Shipping Nations
- World Seaborne Trade and World Port Traffic

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Phone: +49 421 220 96-0
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Shipping Statistics and Market Review

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World Tanker Market

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Abbreviations

ARA	Antwerp/Rotterdam/Amsterdam range
b/d	Barrels per day
BHP	Brake horsepower
CESA	Community of European Shipbuilders
cgt	Compensated gross tonnage
cif	Cost, insurance, freight
CIS	Commonwealth of Independent States
COD	Country of Domicile
CPE	Centrally-planned Economies
CPI	Consumer price index
cST	Centi Stokes
cu.m	Cubic metres (also m ³)
DB	Double bottom
DC	Developing Countries
DH	Double hull
DIS	Danish International Ship Register
DME	Developed market economies
DS	Double sides
dwt	Deadweight tons
d/y	Day/year
ECB	European Central Bank
EMEs	Emerging Market Economies
EU	European Union
FY	Fiscal year
FAO	Food and Agriculture Organization of the United Nations
fio	Free in and out
fob	Free on board
FT	Freight tons
ft	Foot
GATT	General Agreement on Tariffs and Trade
gt	Gross tonnage
HP	Horsepower
HT	Harbour ton
ibf	Intermediate bunker fuel
IEA	International Energy Agency
IMF	International Monetary Fund
IMO	International Maritime Organization
in.	Inch
ITF	International Transport Workers Federation
km	Kilometre
loa	Length overall
lbs	Pounds
LDT	Light displacement tons
LDC	Less Developed Countries
LNG	Liquefied Natural Gas
LPG	Liquefied Petroleum Gas
LT	Long ton
m	Metre
mbd	Million barrel per day
mdo	Marine diesel oil
MED	Mediterranean
MfA	Marine fishing area
mill	Million
M/T	Motor tanker
MT	Metric tons
mtd	per ton fob delivered
mtb	Month
mtw	Per ton ex wharf
n.a.	Not available

NDRF	National Defence Reserve Fleet
n.e.c.	Not elsewhere classified
neg.	Negligible
NIS	Norwegian International Ship Register
no	Number
NODC	Non-oil Producing Developing Countries
nrt	Net register tonnage
nt	Net tonnage
NWE,NW	Northwest Europe
o.a.	Over all
OBO	Ore/bulk/oil carrier
OECD	Organization for Economic Cooperation and Development
O/O	Ore/oil carrier
OPEC	Organization of Petroleum Exporting Countries
OR	Ordinary Register
P/C	Products carrier
Pr/OBO	Product/ore-bulk-oil carrier
r	Revised
Ro/ro	Roll-on/roll-off
RT	Revenue ton
SAR	Special administration region
SBT	Ship segregated ballast tanks
SDR	Special drawing rights
SSMR	ISL Shipping Statistics and Market Review
ST	Short ton
t	Ton/tonne
TB	Tug/barge
TEU	Twenty feet equivalent unit
TKB	Tanker barge
T/S	Tanker/steam
T/T	Tanker/turbine
ULCC	Ultra large crude carrier
USAC	United States Atlantic Coast
USD	US Dollar
VLCC	Very large crude carrier
VLOC	Very large ore carrier
WS	Worldscale
WTO	World Trade Organization
YR, YRS	Year, Years

Symbols

...	Data not available
-	Nil
0/0.0	Less than half of unit employed
1995-2004	From 1995 to 2004 inclusive
2002/03	Crop year, fiscal year etc., beginning in 2002 and terminating in 2003

Billions means a thousand million

Detailed items in tables do not necessarily add to totals because of rounding

► For further explanation (e.g. Glossary) please visit: www.isl.org/infoline

ISL Comment – World Tanker Market

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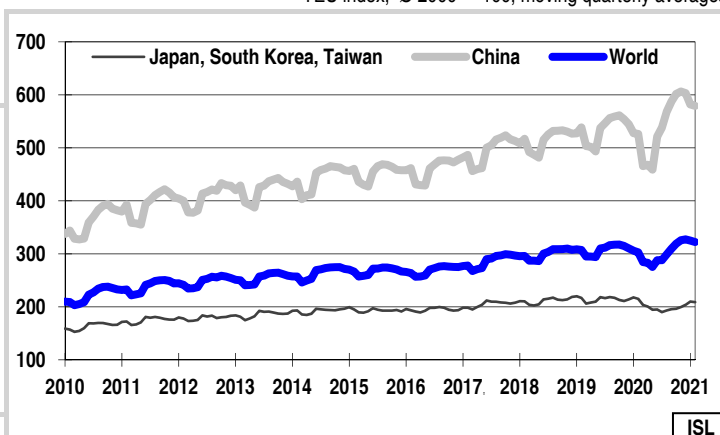
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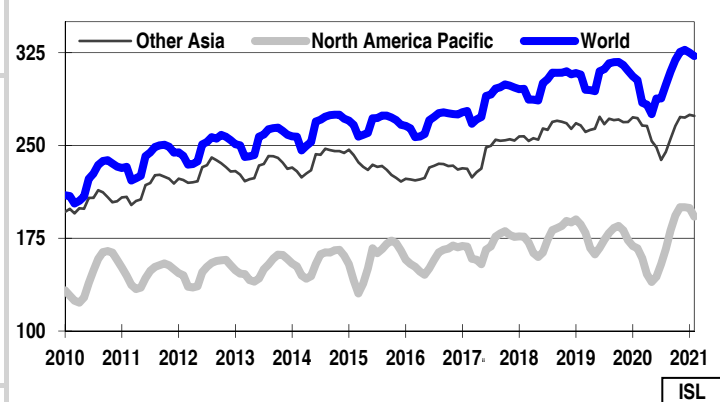
TEU index; Ø 2000 = 100; moving quarterly averages

Month	Japan, South Korea, Taiwan			China		
	2019	2020	2021	2019	2020	2021
Jan.	206.9	217.8	210.0	527.4	527.9	581.9
Feb.	204.9	215.1	208.8	538.6	526.2	579.2
March	194.0	203.6		503.5	465.6	
April	195.1	200.6		501.8	468.0	
May	196.0	194.5		493.4	459.0	
June	204.7	194.9		537.6	521.3	
July	202.7	190.0		546.7	538.2	
Aug.	204.2	193.1		556.2	568.2	
Sep.	202.4	195.6		559.0	587.5	
Oct.	199.0	196.4		561.0	601.8	
Nov.	197.5	199.5		554.1	606.3	
Dec.	200.4	203.7		544.7	603.4	
Average	200.6	200.4	209.4	515.1	535.3	580.5



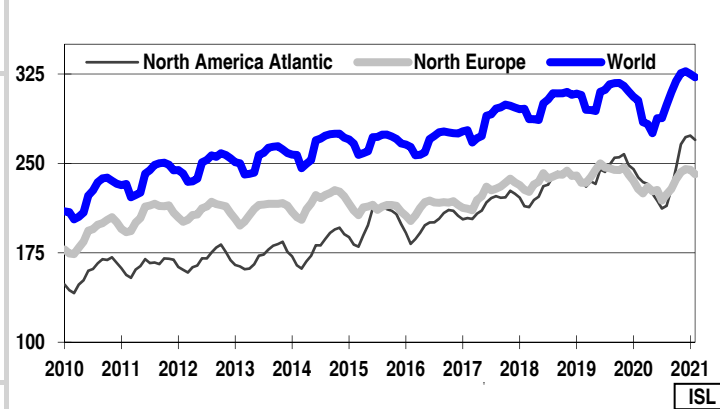
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Month	Other Asia			North America Pacific		
	2019	2020	2021	2019	2020	2021
Jan.	267.9	272.7	274.8	190.2	168.7	199.4
Feb.	266.2	272.1	273.9	186.2	166.8	192.5
March	261.0	266.1		179.3	159.0	
April	262.6	265.7		167.1	145.8	
May	263.5	253.6		162.0	139.7	
June	273.2	248.6		167.2	143.8	
July	267.3	238.3		173.8	154.1	
Aug.	271.6	244.8		179.4	166.3	
Sep.	270.4	255.4		183.3	181.3	
Oct.	271.1	265.9		184.9	193.4	
Nov.	268.8	273.0		181.4	200.1	
Dec.	268.6	272.5		173.3	200.1	
Average	267.7	260.7	274.3	177.3	168.3	196.0



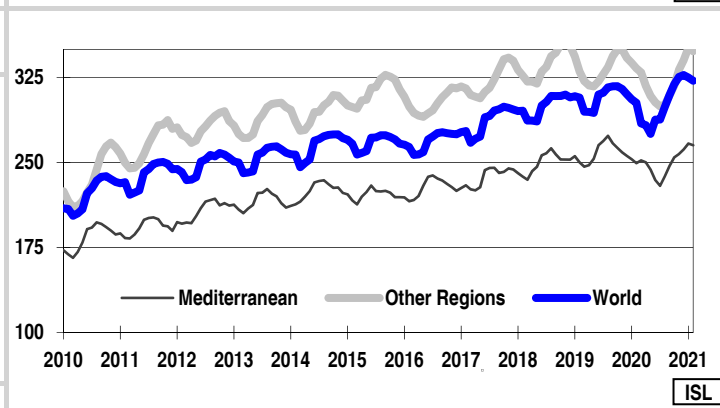
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Month	North America Atlantic			North Europe		
	2019	2020	2021	2019	2020	2021
Jan.	239.3	245.1	273.3	239.8	235.4	244.7
Feb.	234.8	238.2	269.8	234.2	228.5	241.0
March	230.6	234.4		232.5	224.9	
April	234.9	232.7		234.9	230.3	
May	232.8	224.5		244.5	226.6	
June	244.8	218.8		252.2	227.7	
July	242.9	212.2		249.9	218.9	
Aug.	249.0	214.4		250.4	224.1	
Sep.	254.7	228.2		248.0	228.6	
Oct.	255.2	246.6		246.3	236.8	
Nov.	257.7	266.0		248.0	242.7	
Dec.	248.3	272.1		243.3	245.2	
Average	243.8	236.1	271.5	244.0	230.8	242.8



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Month	Mediterranean			Other Regions		
	2019	2020	2021	2019	2020	2021
Jan.	255.7	253.3	266.8	343.8	338.0	351.4
Feb.	249.6	249.5	265.4	330.4	333.2	348.3
March	246.9	251.6		321.9	329.6	
April	247.3	249.5		318.2	317.7	
May	252.9	243.6		317.4	308.9	
June	263.0	234.8		321.7	303.2	
July	266.0	230.1		328.0	299.7	
Aug.	269.3	238.1		334.3	301.1	
Sep.	262.9	247.5		343.9	309.3	
Oct.	260.4	254.9		350.0	317.9	
Nov.	257.1	258.4		349.9	332.0	
Dec.	248.1	262.5		342.4	340.3	
Average	256.6	247.8	266.1	333.5	319.2	349.9



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Note: For further information, e.g. definition of port regions, please see Definitions.

(Source: ISL Monthly Container Port Monitor 2021)

Fleet and New Construction Data

Country of registration and country of control
Country of registration indicates the country of the port of registry of a country (flag). The country of control is defined as the "Real Nationality", i.e. the home country of the interests behind the primary reference company. None of the information regarding ownership is intended to confirm or otherwise the legal status of the companies or the ships associated with them

Denmark includes Faeroes, Greenland.

France includes New Caledonia, French Polynesia, Réunion, Wallis and Futuna Islands.

Netherlands includes Netherlands Antilles, Curacao.

Portugal includes Madeira.

Spain includes Canary Islands.

UK includes Isle of Man and Falkland Island.

US includes Puerto Rico.

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"The statistical and graphical Data contained under the heading is drawn from the Clarkson Research Services Limited ("CRSL") database and other sources. CRSL has advised that: (i) some Data in CRSL's database is derived from estimates or subjective judgments; and (ii) the Data in the databases of other marine data collection agencies may differ from the Data in CRSL's database; and (iii) whilst CRSL has taken reasonable care in the compilation of the statistical and graphical Data and believes it to be accurate and correct, data compilation is subject to limited audit and validation procedures and may accordingly contain errors; and (iv) CRSL, its agents, officers and employees do not accept liability for any loss suffered in consequence of reliance on such Data or in any other manner; and (v) the provision of such Data does not obviate any need to make appropriate further enquiries; and (vi) the provision of such Data is not an endorsement of any commercial policies and/or any conclusions by CRSL".

Broken-up Tonnage

includes ships sold for breaking. Figures on broken-up tonnage are not revised if vessels reported for breaking are trading again.

Merchant Ship Type Structures

Based on „An International Classification of Ships by Type" (ICST (1994)

Definition of terms used in merchant ship structures type classification.

Tanker: Single-deck vessel constructed and arranged for the carriage of liquid cargoes in tanks integral to the hull and include crude oil or non-hazardous (IMO code) refined products.

Chemical tanker: Vessel constructed and arranged for carrying hazardous (IMO code) cargoes in special tanks.

Liquid gas tanker: Vessel constructed and arranged for the carriage of liquefied gases either in integral tanks or independent

tanks under pressure or refrigerated.

Dry Bulk: Dry cargo vessel. One deck, machinery aft with topside tanks capable of carrying a variety of self-trimming cargoes.

Ore Carrier (Bulk Carrier): Dry cargo vessel, one deck, strengthening for ore cargoes.

Ore/Bulk/Oil Carrier (OBO): Bulk carrier arranged for the carriage of either bulk dry cargoes or liquid cargoes in the same cargo spaces but not simultaneously.

General Cargo: Single or multi-deck general dry cargo vessel with facilities for loading/ discharging cargo.

Specialised Carrier (Special Ship): Dry cargo vessel specially designed for the carriage of particular cargoes, incl. car-carriers.

Reefer: Specialised dry cargo vessel with 80 % or more insulated cargo space.

RoRo Cargo/RoRo Passenger: Vessel arranged for Roll-on Roll-off loading / discharging of vehicles (road and/or rail) as cargo and / or passenger conveyances.

Container Ship (Fully Cellular Container Ships): Vessel fitted throughout with fixed or portable cell guides for the carriage of containers above and below the weather deck.

Passenger: Vessel which carries more than 12 fare paying passengers whether berthed or unberthed (ferries).

Basic Ship Type Structure and ISL Ship Type Aggregates

MERCHANT SHIP		STRUCTURES	ISL SHIP TYPES	
			Special Fleet Report	Broken-up tonnage etc.
LIQUID	Oil tankers	- Crude oil tankers - Crude/products tankers - Products tankers	Oil tankers " "	Tankers " "
	Oil / Chemical tankers	- Oil chemical tankers - Chemical tankers - Other tankers	Oil / Chemical tankers " "	Tankers "
	Liquid gas tankers	- LNG carriers - LPG carriers - Other liquid gas carriers	Liquid gas tankers " "	Tankers " "
DRY BULK	Bulk carriers	- bulk carriers - other bulk carriers incl. ore carriers - Ore/bulk/oil carriers - Ore/oil carriers - Bulk/oil carriers	Bulk carriers Other bulk carriers " " "	Bulk carriers " " " "
OTHER DRY CARGO	General cargo ships	of which - Conventional Cargo ships - Special ships - Pure car carriers - Reefer ships - RoRo cargo ships	General cargo ships, of which Conventional Cargo ships Special ships Pure car carriers Reefer ships RoRo cargo ships	General cargo ships, of which Conventional Cargo ships (a) (a) (a)
	Container ships	- Fully cellular container ships	Fully cellular container ships	Fully cellular container ships
	Passenger and passenger cargo ships (b)	of which - Passenger ships - Cargo/RoRo passenger ships	Passenger and cargo passenger ships, of which Passenger ships Cargo/RoRo passenger ships	Passenger ships " "

(a) Included in General Cargo Ships.

(b) Including ships (berthed and unberthed) for passenger transport and passenger carrying vessels like general cargo passenger ships, ro-ro passenger ships (ferries).

► For further explanation (e.g. Trade and Traffic Statistics) please visit: www.isl.org/infoline

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