

SHIPPING STATISTICS AND MARKET REVIEW 2023

Vol. 67 – No. 01

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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Volume 67 - 2023

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Shipping Statistics and Market Review

Analytical Focus

World Merchant Fleet

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Abbrevi	iations	mln	Million		
A D A	Antivora / Dettordom / Ametordom rongo	M/T	Motor tanker		
ARA	Antwerp/Rotterdam/Amsterdam range	MT	Metric tons		
b/d	Barrels per day	mtd	per ton fob delivered		
ВНР	Brake horsepower	mth	Month		
bln	Billion	mtw	Per ton ex wharf		
CBM	Cubic metres (also m³)	n.a.	Not available		
CEU	Car equivalent unit	NDRF	National Defence Reserve Fleet		
cgt	Compensated gross tonnage	n.e.c.	Not elsewhere classified		
cif	Cost, insurance, freight	neg. NIS	Negligible Norwegian International Ship Register		
CIS	Commonwealth of Independent States	no	Number		
CLIA	Cruise Lines International Association	nrt	Net register tonnage		
COD	Country of Domicile	nt	Net tonnage		
CPE	Centrally-planned Economies	NWE,NW	Northwest Europe		
CPI	Consumer price index	o.a.	Over all		
CRSL	Clarkson Research Services Limited	ОВО	Ore/bulk/oil carrier		
	Centi Stokes	OECD	Organization for Economic Cooperation and		
cST			Development		
cu.m	Cubic metres (also m3)	OPEC	Organization of Petroleum Exporting Countries		
DB	Double bottom	OR	Ordinary Register		
DC	Developing Countries	P/C	Products carrier		
DH	Double hull	r	Revised		
DIS	Danish International Ship Register	ro/ro	Roll-on/roll-off		
DME	Developed market economies	RT	Revenue ton		
DS	Double sides	SAR	Special administration region		
dwt	Deadweight tons	SBT	Ship segregated ballast tanks		
d/y	Day/year	SDR SEA Furance	Special drawing rights		
ECB	European Central Bank	SEA Europe	Shipyards' & Maritime Equipment Association of Europe		
EMEs	Emerging Market Economies	SOx	sulfur oxides		
		SSMR	ISL Shipping Statistics and Market Review		
EU	European Union	SSYB	ISL Shipping Statistics Yearbook		
FY	Fiscal year	ST	Short ton		
FAO	Food and Agriculture Organization of the United Nations	t	Ton/tonne		
FEU	Forty feet equivalent unit	ТВ	Tug/barge		
fio	Free in and out	TC	Time charter		
fob	Free on board	TEU	Twenty-foot equivalent unit		
FT	Freight tons	TKB	Tanker barge		
ft	Foot	ULCC	Ultra large crude carrier		
GATT	General Agreement on Tariffs and Trade	USAC	United States Atlantic Coast		
gt/grt	Gross tonnage	USGC	United States Gulf Coast		
HP	Horsepower	USPC	United States Pacific Coast		
НТ	Harbour ton	USD/\$	US Dollar		
ibf	Intermediate bunker fuel	VLCC	Very large crude carrier		
IEA	International Energy Agency	VLOC WS	Very large ore carrier Worldscale		
		WTO	World Trade Organization		
IMF	International Monetary Fund	YR, YRS	Year, Years		
IMO	International Maritime Organization	111, 1113	rear, rears		
in.	Inch	Symbols			
ITF	International Transport Workers Federation	Syllibols			
km	Kilometre		Data not available		
loa	Length overall	-	Nil		
lbs	Pounds	0/0.0	Less than half of unit employed		
LDT	Light displacement tons	1995-2021	From 1995 to 2021 inclusive		
LDC	Less Developed Countries	2002/03	Crop year, fiscal year etc., beginning		
LNG	Liquefied Natural Gas		in 2002 and terminating in 2003		
LPG	Liquefied Petroleum Gas	Dillions mass	ns a thousand million		
LT	Long ton				
	_	Detailed items in tables do not necessarily add to totals			
m mbd	Metre Million barrel per day	rounding			
mdo	Marine diesel oil				
MED	Mediterranean	For further explanation (e.g. Glossary) please visit:			
MfA	Marine fishing area	<u>www.is</u>	<u>ı.org</u>		
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New ISL Publication – ISL Shipping Statistics Yearbook 2022

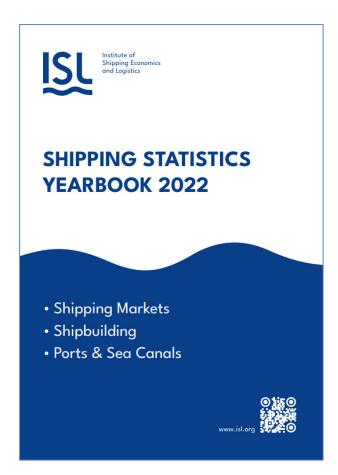
The shipping industry needs various information to evaluate market dynamics. The conceptual approach of the ISL SHIPPING STATISTICS YEARBOOK which goes back to the year 1986 is designed to inform on developments in shipping, world trade, seaborne trade, commodity markets, ocean freight and charter rates, individual profiles of shipping and shipbuilding countries, as well as on world port developments. ISL provides the yearbook for many years as a source for market analysis.

The various development indicators are presented within three main sections:

- The Shipping Market
- Shipbuilding
- Ports and Sea Canals

Moreover the Yearbook comprises an indepth analytical comment.

The ISL Yearbook is a unique, worldwide distributed statistical source and designed to particularly meet the requirements of shipowners, shipbuilders/repairers, port authorities, brokers, banks, transportation consultants, universities and research institutes.



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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 French Polynesia, Guadeloupe, Martinique, Mayotte, New Caledonia, Réunion, Saint-Pierre-et-Miquelon, Wallis and Futuna Islands

Netherlands includes Netherlands Antilles, Curacao, Aruba.

Portugal includes Madeira.

Spain includes Canary Islands.

UK includes Isle of Man, Falkland Island, Turks and Caicos , St. Helens, Jersev.

US includes Puerto Rico.

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).

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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".

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 incl. ore carriers - other bulk carriers incl. ore carriers - Ore/bulk/oil carriers - Ore/oil carriers - Bulk/oil carriers - Bulk/oil carriers - Bulk/oil carriers - Bulk/oil carriers - Conventional Cargo ships - Special ships - Pure car carriers - Reefer ships - RoRo cargo ships - Fully cellular container ships - Passenger and - passenger - Passenger ships - Passenger ships - Passenger ships - Passenger ships		Bulk carriers Other bulk carriers " "	Bulk carriers " " " "			
		- Conventional Cargo ships - Special ships - Pure car carriers - Reefer 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)		
			Fully cellular container ships Passenger and cargo passenger ships, of which Passenger ships	Fully cellular container ships Passenger ships "		
		- Cargo/RoRo passenger ships	Cargo/RoRo passenger ships	п		

⁽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

Definitions www.isl.org

ISL Monthly Container Port Traffic Indices 2012 - 2022

ISL's Monthly Container Port Traffic Index is based on monthly container traffic of the world's top container ports. In total, the ports reflected in the index handled approx. 555.2 mill TEU in 2021, equalling around 78 per cent of world container traffic. The monthly TEU volumes per port are available since 2000. The different regions are represented by the following ports:

Japan, S. Korea,

Taiwan: Kobe, Nagoya, Osaka, Tokyo, Yokohama, Busan, Inchon, Kwangyang, Kaohsiung, Keelung, Taichung

China: Guangzhou, Hong Kong, Ningbo, Qingdao, Shanghai, Shenzhen, Tianjin, Xiamen

Other Asia: Bandar Abbas, Ashdod, Haifa, Beirut, Salalah, Dammam, Jeddah, Jebel Ali, Chennai, Nhava Sheva,

Manila, Singapore, Colombo, Bangkok, Laem Chabang

North-America Pacific: Long Beach, Los Angeles, Oakland, Seaport Alliance (Seattle, Tacoma), Prince Rupert, Vancouver

North-America Atlantic: Baltimore, Charleston, Houston, Montreal, New York/ New Jersey, Port of Virginia, Savannah

North Europe: Antwerp, Bremen / Bremerhaven, Dublin, Gdansk, Hamburg, Helsinki, Klaipeda, Kotka, Le Havre,

Lissabon, Rotterdam, Sines, St Petersburg, Tallinn, Zeebrugge

Mediterranean: Alexandria (Egypt), Ambarli (, Ashdod, Algeciras-La Linea, Barcelona, Beirut, Casablanca, Genoa, Gioia

Tauro, Haifa, Marseilles, Mersin, Napoli, Salerno, Port Said, Valencia

Other Regions: Africa: Pointe Noir (Congo), Tanger (Morocco), Capetown, Durban, Ngqura (South Africa). South and

Central America: Buenos Aires (Argentina), Itajai, Paranagua, Rio Grande do Sul, Santos (Brazil), San Antonio (Chile), Cartagena (Colombia), Guayaquil (Ecuador), Lazaro Cardenas, Manzanillo, Veracruz (Mexico), Balboa, Manzanillo (Panama), Callao (Peru), Montevideo (Uruguay). **Oceania:** Brisbane,

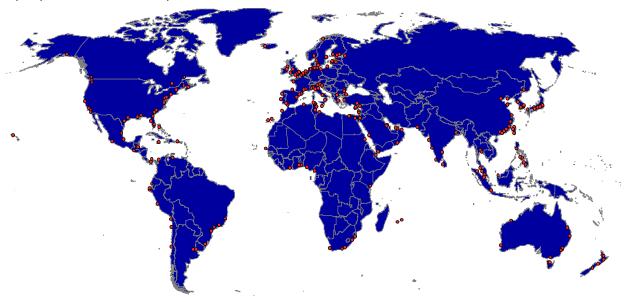
Freemantle, Melbourne, Sydney (Australia)

(Source: ISL Port Data Base 2022)

The ISL Port Data Base

the most comprehensive data base in port traffic

The ISL Port Data Base contains structured, comparable data on shipping, cargo and container traffic for more than 400 leading world ports since 1980. The data is constantly updated and completed, including today about 200 items per port and per year. This unique data base is made possible by our network partners troughout the world providing the broad information for our yearly ISL Port Data Base Survey.



Basis of calculation:

Our basis for customised extracts from the Port Data Base is as follows: € 60 - basic fee, plus € 0.60 per item. The basic fee includes the setting up of a suited layout the addition of the necessary explanatory remarks and footnotes as well as the transmission of the data by E-Mail or by fax. By subscribing to a specified analysis on a yearly basis, you will save the basic fee and get an additional 20 per cent off the other costs starting the second year. Apart from customised database extracts, we provide standardised port profiles and rankings. Please contact us for contractual information.

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ISL - Institute of Shipping Economics and Logistics

The ISL - Institute of Shipping Economics and Logistics was founded in Bremen in 1954. By combining tradition and modern science, ISL has positioned itself as one of Europe's leading institutions for research, consulting and know-how transfer in maritime logistics.

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