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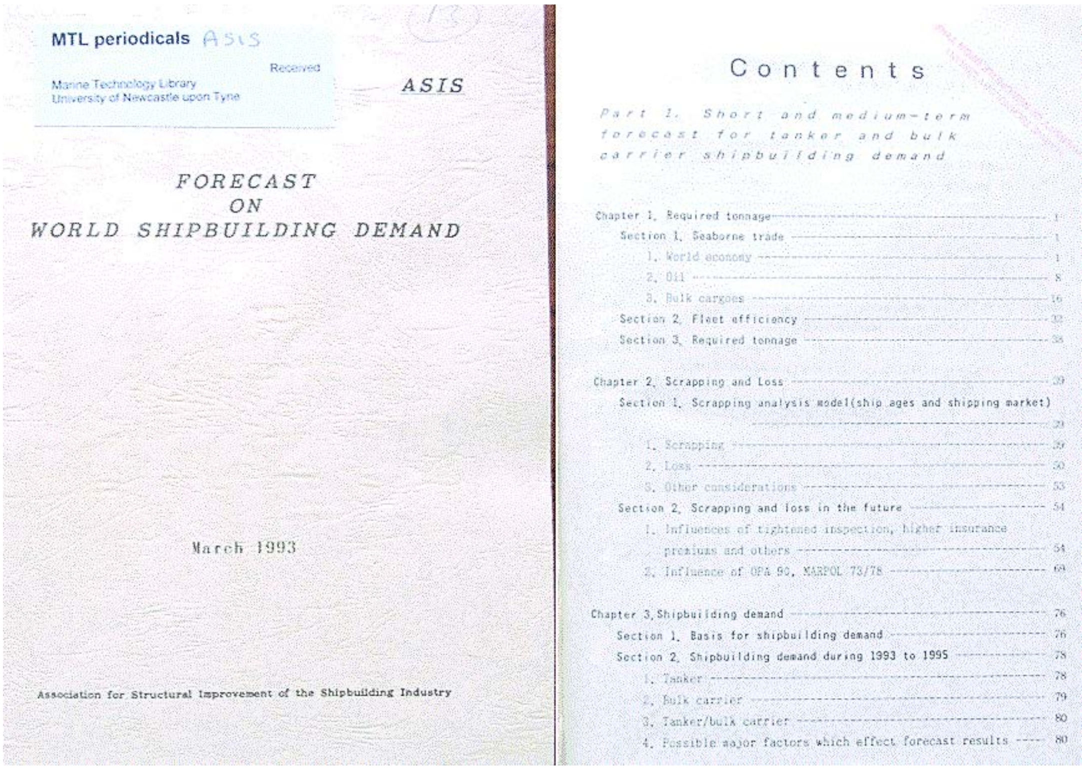


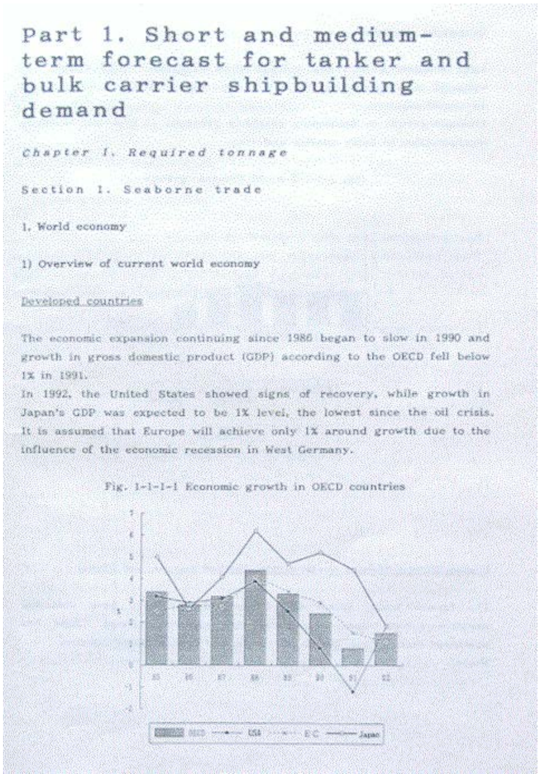
ASIS

FORECAST
ON
WORLD SHIPBUILDING DEMAND

March 1993

Association for Structural Improvement of the Shipbuilding Industry

Contents



Part 1. Short and medium-term forecast for tanker and bulk carrier shipbuilding demand

Chapter 1. Required tonnage

Section 1. Seaborne trade

1. World economy

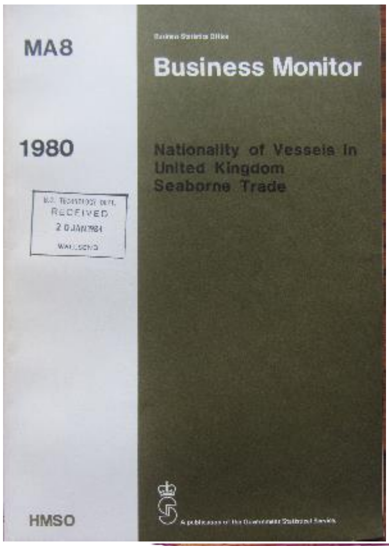
1) Overview of current world economy

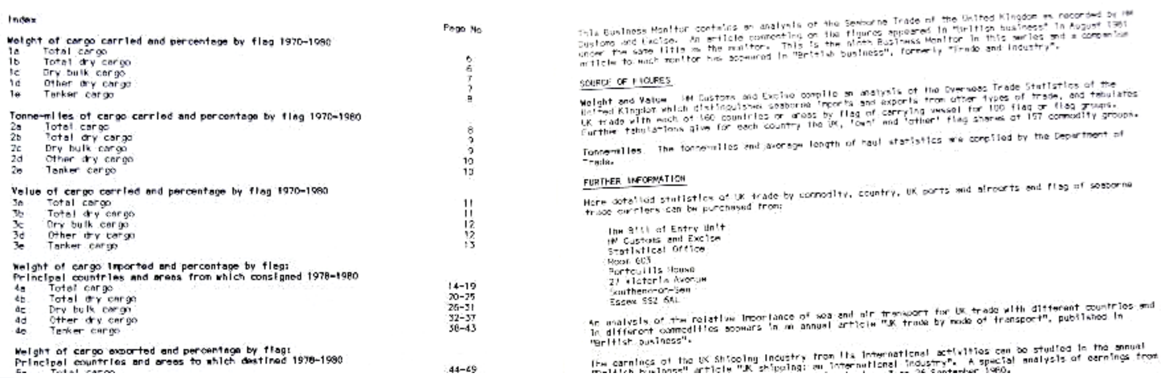
Developed countries

The economic expansion continuing since 1986 began to slow in 1990 and growth in gross domestic product (GDP) according to the OECD fell below 1% in 1991.
In 1992, the United States showed signs of recovery, while growth in Japan's GDP was expected to be 1% level, the lowest since the oil crisis. It is assumed that Europe will achieve only 1% around growth due to the influence of the economic recession in West Germany.

Fig. 1-1-1-1 Economic growth in OECD countries

- ***Business Monitor MA8, Nationality of United Kingdom Seaborne Trade 1980***

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This Business Monitor contains an analysis of the Seaborne Trade of the United Kingdom as recorded by HM Customs and Excise. An article commenting on the figures appeared in "British business" in August 1981 under the same title as the monitor. This is the ninth Business Monitor in this series and a companion article to each monitor has appeared in "British business", formerly "Trade and Industry".

SOURCE OF FIGURES

Weight and Value HM Customs and Excise compile an analysis of the Overseas Trade Statistics of the United Kingdom which distinguishes seaborne imports and exports from other types of trade, and tabulates UK trade with each of 160 countries or areas by flag of carrying vessel for 100 flag or flag groups. Further tabulations give for each country the UK, 'own' and 'other' flag shares of 157 commodity groups.

Tonne-miles The tonne-miles and average length of haul statistics are compiled by the Department of Trade.

FURTHER INFORMATION

More detailed statistics of UK trade by commodity, country, UK ports and airports and flag of seaborne trade carriers can be purchased from:

The Bill of Entry Unit
HM Customs and Excise
Statistical Office
Room 603
Portcullis House
27 Victoria Avenue
Southend-on-Sea
Essex SS2 6AL

An analysis of the relative importance of sea and air transport for UK trade with different countries and in different commodities appears in an annual article "UK trade by mode of transport", published in "British business".

The earnings of the UK Shipping Industry from its international activities can be studied in the annual "British business" article "UK shipping: an international industry". A special analysis of earnings from [illegible] September 1980.

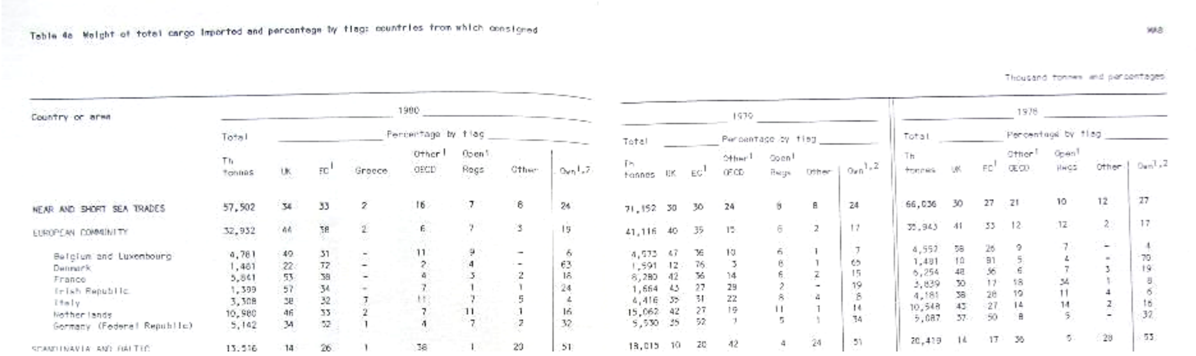


Table 4a Weight of total cargo imported and percentage by flag: countries from which consigned

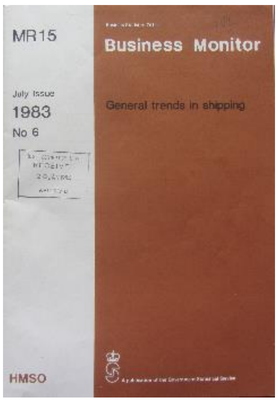
MA8

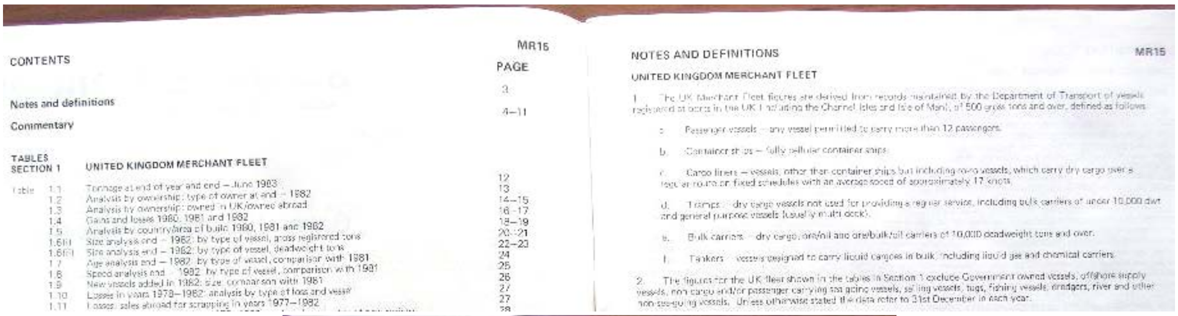
Thousand tonnes and percentages

Country or area	1980 Total Th tonnes	UK	EC[1]	Greece	Other[1] OECD	Open[1] Regs	Other	Own[1,2]
NEAR AND SHORT SEA TRADES	57,502	34	33	2	16	7	8	24
EUROPEAN COMMUNITY	32,932	44	38	2	6	7	3	19
Belgium and Luxembourg	4,781	49	31	-	11	9	-	6
Denmark	1,461	22	72	-	2	4	-	63
France	5,841	53	38	-	4	3	2	16
Irish Republic	1,399	57	34	-	7	1	1	24
Italy	3,308	38	32	7	11	7	5	4
Netherlands	10,980	46	33	2	7	11	1	16
Germany (Federal Republic)	5,142	34	52	1	4	7	2	32
SCANDINAVIA AND BALTIC	13,516	14	26	1	38	1	20	51

Country or area	1979 Total Th tonnes	UK	EC[1]	Other[1] OECD	Open[1] Regs	Other	Own[1,2]	1978 Total Th tonnes	UK	EC[1]	Other[1] OECD	Open[1] Regs	Other	Own[1,2]
NEAR AND SHORT SEA TRADES	71,152	30	30	24	8	8	24	66,036	30	27	21	10	12	27
EUROPEAN COMMUNITY	41,116	40	35	15	6	2	17	35,943	41	33	12	12	2	17
Belgium and Luxembourg	4,573	47	36	10	6	1	7	4,557	58	26	9	7	-	4
Denmark	1,591	12	76	3	8	1	65	1,481	10	81	5	4	-	70
France	8,280	42	36	14	6	2	15	6,254	48	36	6	7	3	19
Irish Republic	1,664	43	27	29	2	-	19	3,839	30	17	18	34	1	8
Italy	4,416	35	31	22	8	4	8	4,181	38	28	19	11	4	6
Netherlands	15,062	42	27	19	11	1	14	10,548	43	27	14	14	2	16
Germany (Federal Republic)	5,530	35	52	7	5	1	34	5,087	37	50	8	5	-	32
SCANDINAVIA AND BALTIC	18,015	10	20	42	4	24	51	20,419	14	17	36	5	28	53

- ***Business Monitor MR15, General Trends in Shipping 1983***





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MR15

NOTES AND DEFINITIONS

MR15

UNITED KINGDOM MERCHANT FLEET

1. The UK Merchant Fleet figures are derived from records maintained by the Department of Transport of vessels registered at ports in the UK (including the Channel Isles and Isle of Man), of 500 gross tons and over, defined as follows:

a. Passenger vessels – any vessel permitted to carry more than 12 passengers.

b. Container ships – fully cellular container ships.

c. Cargo liners – vessels, other than container ships but including ro-ro vessels, which carry dry cargo over a regular route on fixed schedules with an average speed of approximately 17 knots.

d. Tramps – dry cargo vessels not used for providing a regular service, including bulk carriers of under 10,000 dwt and general purpose vessels (usually multi deck).

e. Bulk carriers – dry cargo, ore/oil and ore/bulk/oil carriers of 10,000 deadweight tons and over.

f. Tankers – vessels designed to carry liquid cargoes in bulk, including liquid gas and chemical carriers.

2. The figures for the UK fleet shown in the tables in Section 1 exclude Government owned vessels, offshore supply vessels, non cargo and/or passenger carrying sea going vessels, sailing vessels, tugs, fishing vessels, dredgers, river and other non-sea-going vessels. Unless otherwise stated the data refer to 31st December in each year.

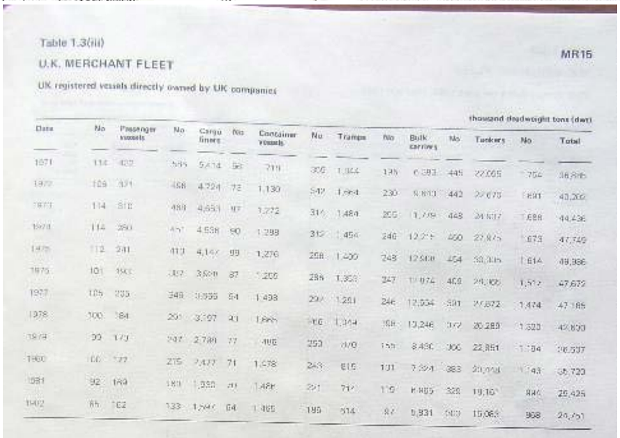


Table 1.3(iii)

MR15

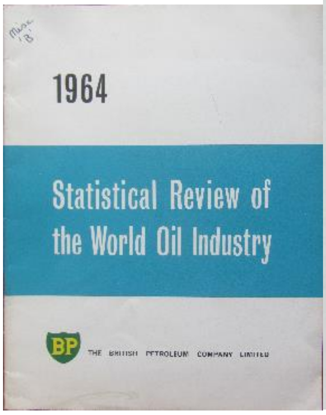
U.K. MERCHANT FLEET

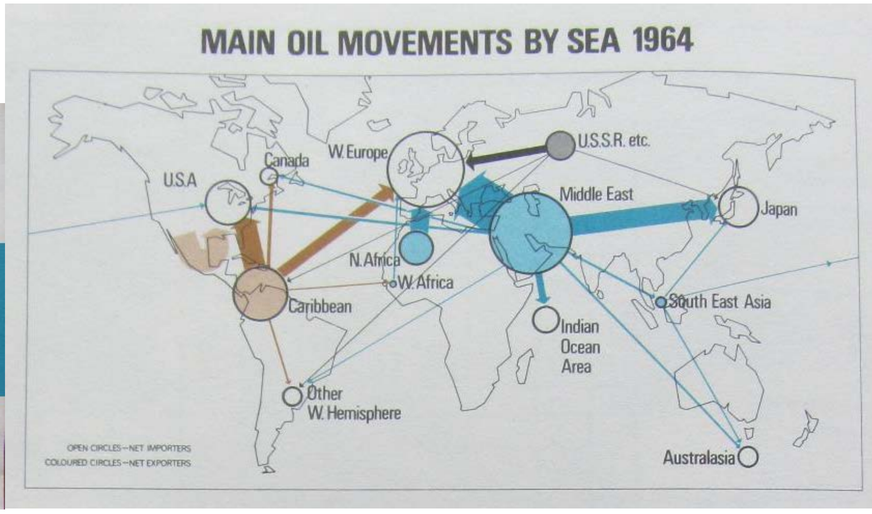
UK registered vessels directly owned by UK companies

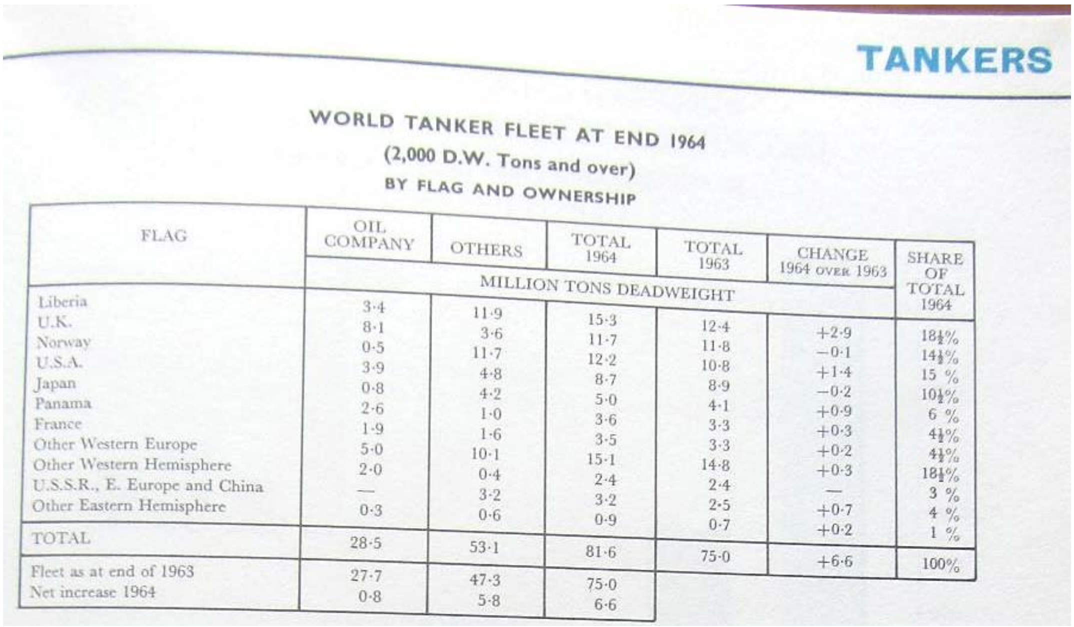
thousand deadweight tons (dwt)

Date	No	Passenger vessels	No	Cargo liners	No	Container vessels	No	Tramps	No	Bulk carriers	No	Tankers	No	Total
1971	114	[illegible]	[illegible]	5,414	[illegible]	719	300	1,344	135	6,383	445	22,065	[illegible]	[illegible]
1972	109	[illegible]	458	4,724	72	1,130	[illegible]	[illegible]	230	[illegible]	442	[illegible]	[illegible]	[illegible]
1973	114	[illegible]	488	[illegible]	[illegible]	1,272	314	1,484	205	[illegible]	448	[illegible]	[illegible]	[illegible]
1974	114	[illegible]	[illegible]	4,538	90	1,298	312	1,454	246	[illegible]	450	[illegible]	[illegible]	47,749
1975	112	241	413	[illegible]	99	1,276	258	1,400	248	[illegible]	454	[illegible]	1,614	49,386
1976	101	[illegible]	[illegible]	[illegible]	87	[illegible]	288	[illegible]	247	[illegible]	[illegible]	[illegible]	[illegible]	47,672
1977	105	235	349	[illegible]	54	[illegible]	[illegible]	[illegible]	246	[illegible]	[illegible]	[illegible]	1,474	[illegible]
1978	100	184	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	13,246	[illegible]	[illegible]	[illegible]	[illegible]
1979	[illegible]	[illegible]	[illegible]	[illegible]	77	[illegible]	253	[illegible]	[illegible]	[illegible]	[illegible]	22,851	[illegible]	[illegible]
1980	[illegible]	[illegible]	275	[illegible]	71	[illegible]	243	815	101	[illegible]	383	[illegible]	[illegible]	[illegible]
1981	92	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
1982	85	[illegible]	133	[illegible]	64	[illegible]	195	514	[illegible]	5,931	[illegible]	[illegible]	[illegible]	[illegible]

- ***BP Statistical Review of the World Oil Industry 1964***





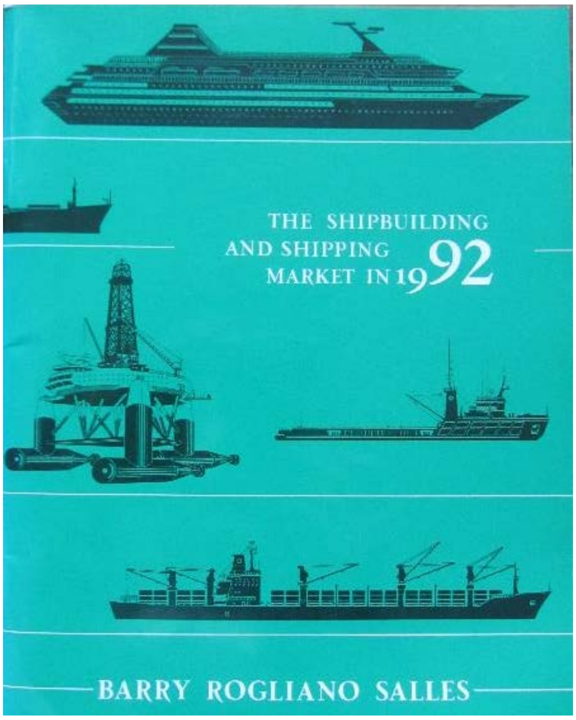


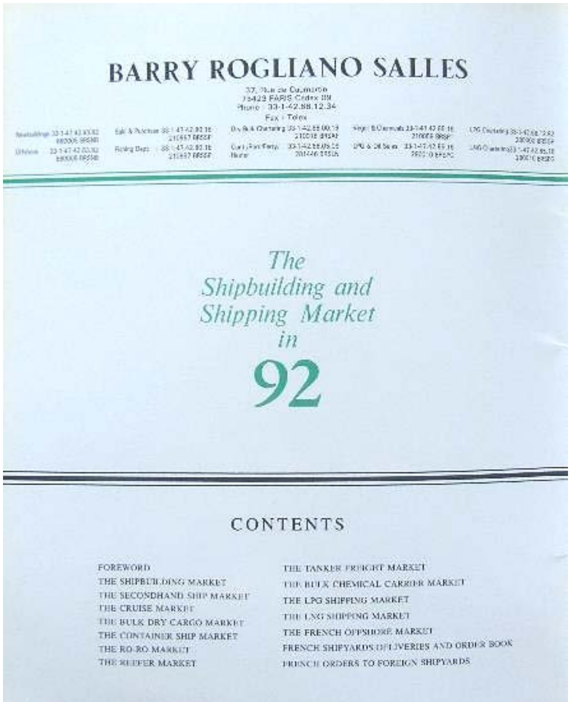
TANKERS

WORLD TANKER FLEET AT END 1964
(2,000 D.W. Tons and over)
BY FLAG AND OWNERSHIP

FLAG	OIL COMPANY	OTHERS	TOTAL 1964	TOTAL 1963	CHANGE 1964 OVER 1963	SHARE OF TOTAL 1964
	MILLION TONS DEADWEIGHT					
Liberia	3·4	11·9	15·3	12·4	+2·9	18½%
U.K.	8·1	3·6	11·7	11·8	−0·1	14½%
Norway	0·5	11·7	12·2	10·8	+1·4	15 %
U.S.A.	3·9	4·8	8·7	8·9	−0·2	10½%
Japan	0·8	4·2	5·0	4·1	+0·9	6 %
Panama	2·6	1·0	3·6	3·3	+0·3	4½%
France	1·9	1·6	3·5	3·3	+0·2	4½%
Other Western Europe	5·0	10·1	15·1	14·8	+0·3	18½%
Other Western Hemisphere	2·0	0·4	2·4	2·4	—	3 %
U.S.S.R., E. Europe and China	—	3·2	3·2	2·5	+0·7	4 %
Other Eastern Hemisphere	0·3	0·6	0·9	0·7	+0·2	1 %
TOTAL	28·5	53·1	81·6	75·0	+6·6	100%
Fleet as at end of 1963	27·7	47·3	75·0			
Net increase 1964	0·8	5·8	6·6			

- ***Barry Rogliano Salles. The shipbuilding and shipping market in 1992***





BARRY ROGLIANO SALLES

The Shipbuilding and Shipping Market in 92

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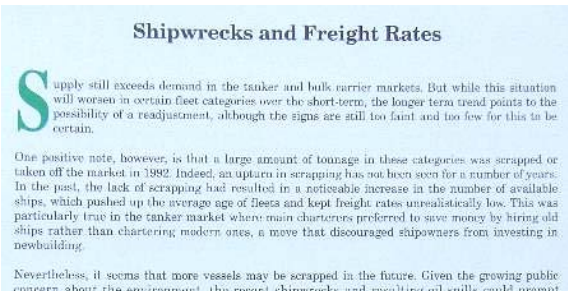


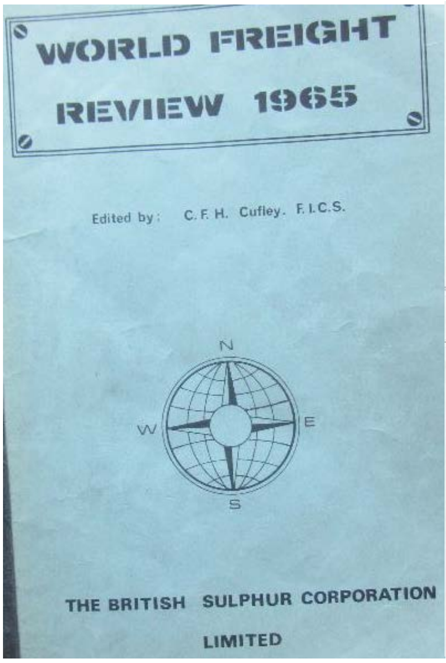
Shipwrecks and Freight Rates

Supply still exceeds demand in the tanker and bulk carrier markets. But while this situation will worsen in certain fleet categories over the short-term, the longer term trend points to the possibility of a readjustment, although the signs are still too faint and too few for this to be certain.

One positive note, however, is that a large amount of tonnage in these categories was scrapped or taken off the market in 1992. Indeed, an upturn in scrapping has not been seen for a number of years. In the past, the lack of scrapping had resulted in a noticeable increase in the number of available ships, which pushed up the average age of fleets and kept freight rates unrealistically low. This was particularly true in the tanker market where main charterers preferred to save money by hiring old ships rather than chartering modern ones, a move that discouraged shipowners from investing in newbuilding.

Nevertheless, it seems that more vessels may be scrapped in the future. Given the growing public

- ***British Sulphur Corporation. World Freight Review 1965***


WORLD FREIGHT REVIEW 1965

Edited by: C. F. H. Cufley. F.I.C.S.

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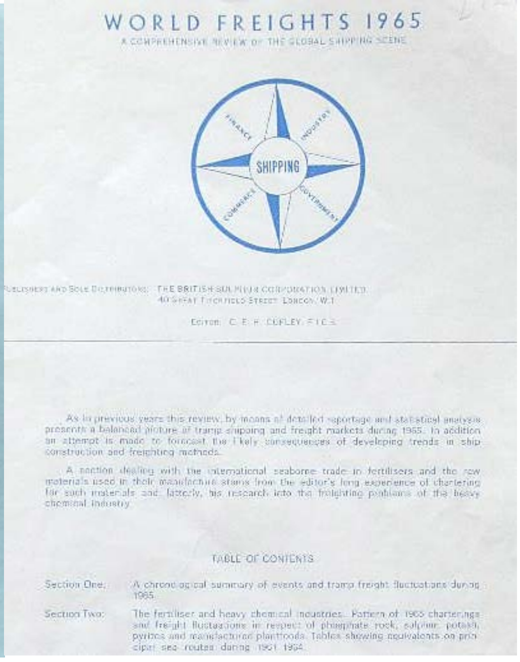
THE BRITISH SULPHUR CORPORATION LIMITED


WORLD FREIGHTS 1965

A COMPREHENSIVE REVIEW OF THE GLOBAL SHIPPING SCENE

PUBLISHERS AND SOLE DISTRIBUTORS: THE BRITISH SULPHUR CORPORATION LIMITED 40 GREAT TITCHFIELD STREET LONDON, W.1

EDITOR: C. F. H. CUFLEY, F.I.C.S.

As in previous years this review, by means of detailed reportage and statistical analysis presents a balanced picture of tramp shipping and freight markets during 1965. In addition an attempt is made to forecast the likely consequences of developing trends in ship construction and freighting methods.

A section dealing with the international seaborne trade in fertilisers and the raw materials used in their manufacture stems from the editor's long experience of chartering for such materials and, latterly, his research into the freighting problems of the heavy chemical industry.

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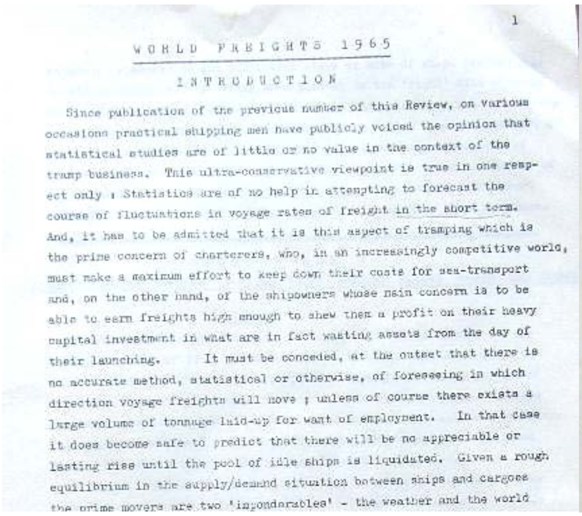
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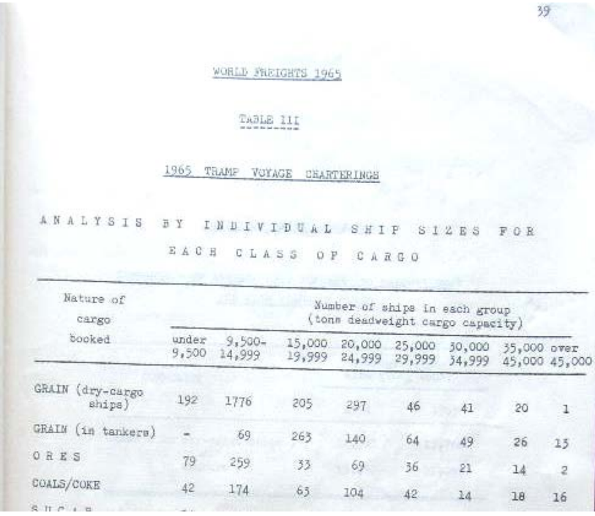
WORLD FREIGHTS 1965

INTRODUCTION

Since publication of the previous number of this Review, on various occasions practical shipping men have publicly voiced the opinion that statistical studies are of little or no value in the context of the tramp business. This ultra-conservative viewpoint is true in one respect only ; Statistics are of no help in attempting to forecast the course of fluctuations in voyage rates of freight in the short term. And, it has to be admitted that it is this aspect of tramping which is the prime concern of charterers, who, in an increasingly competitive world, must make a maximum effort to keep down their costs for sea-transport and, on the other hand, of the shipowners whose main concern is to be able to earn freights high enough to shew them a profit on their heavy capital investment in what are in fact wasting assets from the day of their launching. It must be conceded, at the outset that there is no accurate method, statistical or otherwise, of foreseeing in which direction voyage freights will move ; unless of course there exists a large volume of tonnage laid-up for want of employment. In that case it does become safe to predict that there will be no appreciable or lasting rise until the pool of idle ships is liquidated. Given a rough equilibrium in the supply/demand situation between ships and cargoes the prime movers are two 'imponderables' - the weather and the world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WORLD FREIGHTS 1965

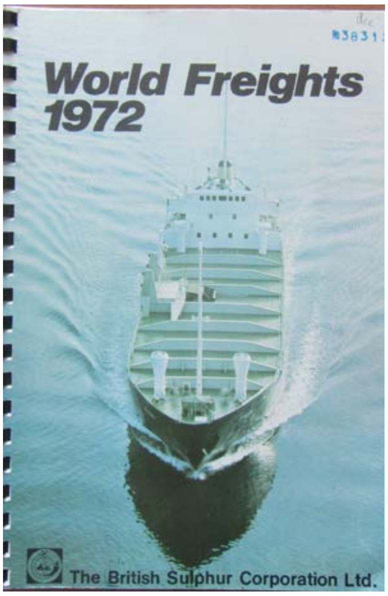
TABLE III

1965 TRAMP VOYAGE CHARTERINGS

ANALYSIS BY INDIVIDUAL SHIP SIZES FOR EACH CLASS OF CARGO

Nature of cargo booked	Number of ships in each group (tons deadweight cargo capacity)							
	under 9,500	9,500-14,999	15,000 19,999	20,000 24,999	25,000 29,999	30,000 34,999	35,000 45,000	over 45,000
GRAIN (dry-cargo ships)	192	1776	205	297	46	41	20	1
GRAIN (in tankers)	-	69	263	140	64	49	26	15
O R E S	79	259	33	69	36	21	14	2
COALS/COKE	42	174	63	104	42	14	18	16

- ***British Sulphur Corporation. World Freights 1962***



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Foreword

Incorporating a much expanded section on fertilizers, fertilizer raw materials and related intermediates, the 1973 edition of World Freights is the eleventh in the series originated by the late Mr. C. F. H. Cufley and published by The British Sulphur Corporation.

The incumbent authors have essentially followed his well-established format for analysing the course of spot-trip and long-term charter freight markets during the year under review, 26 tables of statistics being accompanied by interpretative text in the form of a chronological summary. Total chartering activity in 1972, compared against 1971, is statistically broken down by month, by commodity, by length of charter (voyage and consecutive or long-term) and by reported fixtures. Further analyses for each of the major groups of bulk commodities – grain, coal, scrap, iron/manganese ores, alumina/bauxite,

Trends in 1972

Tonnage over-supply and high oil stocks – poor prospects at the start of the year

The outlook facing tanker owners at the start of 1972 appeared to be as dismal as that facing operators in the dry cargo trades. Fuel oil stocks throughout Western Europe and Japan were already standing at high levels during 1971 partly as a result of mild weather conditions in the 1970/71 winter and partly because of the general economic recession. The winter of 1971/72 was also mild and this aggravated the industry's problems still further. By the beginning of 1972, the ullage position world-wide had deteriorated to such an extent that some tankers were being employed full-time as storage facilities.

yard into lay-up in Norway under directions from Hilarm Reksten, the owners!

In such depressed circumstances as these, laying-up is the only tool at the disposal of tanker owners – other than scrapping the vessel completely – for redressing the supply/demand imbalance. Over 1 million dwt. was removed from the supply side of the equation during these three months from the end of January to reach a total of 106 ships, with an aggregate deadweight tonnage of 2.3 million dwt. in lay-up by the end of April. Even so, this had only a marginal effect on rates. By the end of June the amount of tonnage in lay-up had risen to a peak of 4.1 million dwt., consisting of 144 ships, but by this time market conditions had altered and rates had begun to improve.

Table 1.1.4

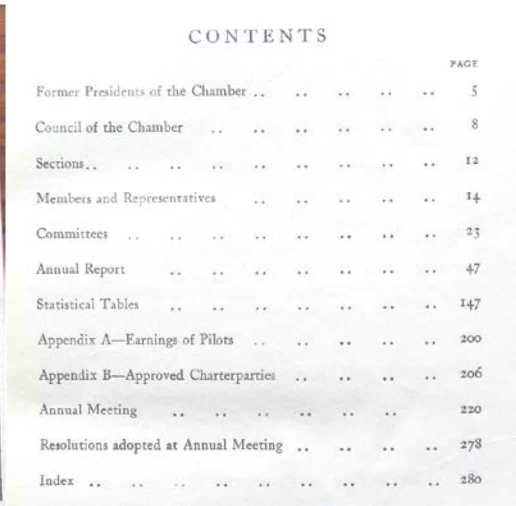
Monthly Tonnages Fixed for Loading/Delivery
(number of vessels and '000 tons)

	Voyage				Consecutive			
	1972		1971		1972		1971	
	No. of ships	'000 tons	No. of ships	'000 tons	No. of ships	'000 tons	No. of ships	'000 tons
January	311	6,429.1	330	5,641.3	24	2,904.6	43	1,734.0
February	304	6,012.9	363	6,415.2	10	301.7	35	1,215.0
March	301	6,167.1	317	5,929.2	14	353.7	44	1,526.6
April	260	5,013.5	348	5,958.4	20	741.0	39	1,393.4
May	323	6,785.2	358	6,326.4	27	976.8	27	878.8
June	287	6,058.9	379	6,888.4	23	838.2	31	1,080.9
July	297	5,935.9	323	5,695.5	30	924.0	23	672.1
August	301	5,934.8	322	5,847.0	31	881.1	16	586.8
September	227	4,674.0	322	5,848.7	24	788.0	18	648.3
October	286	5,990.5	243	4,723.9	30	893.5	16	838.9
November	345	7,207.8	309	5,757.4	33	1,343.6	11	494.4
December	285	6,057.1	288	5,921.2	32	1,225.5	16	794.4

- ***Chamber of Shipping of the United Kingdom 1957-1958. Annual report*.**

CHAMBER OF SHIPPING
OF THE
UNITED KINGDOM
1957 - 1958

ANNUAL REPORT



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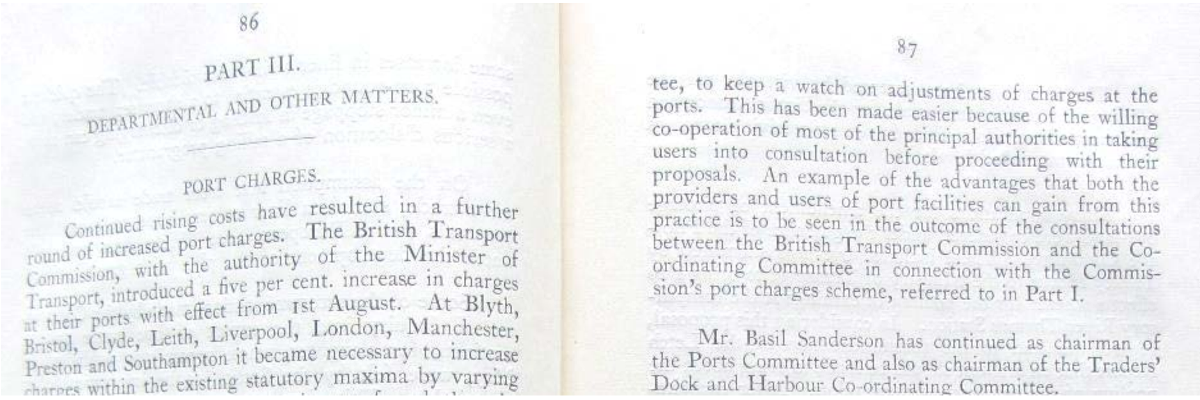

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PART III.

DEPARTMENTAL AND OTHER MATTERS.

PORT CHARGES.

Continued rising costs have resulted in a further round of increased port charges. The British Transport Commission, with the authority of the Minister of Transport, introduced a five per cent. increase in charges at their ports with effect from 1st August. At Blyth, Bristol, Clyde, Leith, Liverpool, London, Manchester, Preston and Southampton it became necessary to increase charges within the existing statutory maxima by varying

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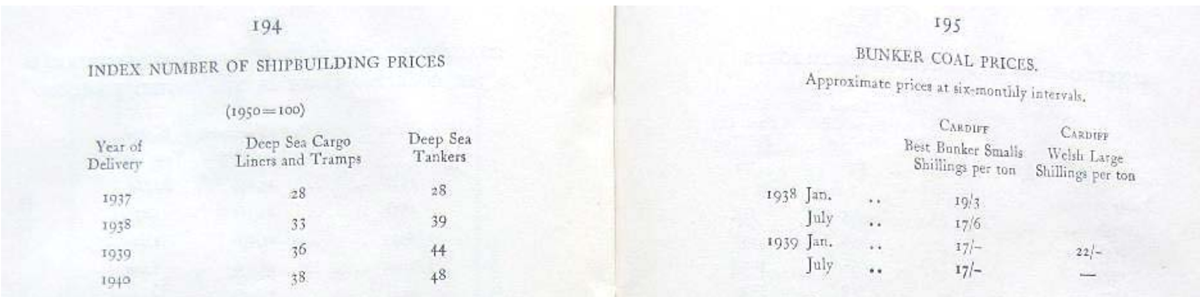
tee, to keep a watch on adjustments of charges at the ports. This has been made easier because of the willing co-operation of most of the principal authorities in taking users into consultation before proceeding with their proposals. An example of the advantages that both the providers and users of port facilities can gain from this practice is to be seen in the outcome of the consultations between the British Transport Commission and the Co-ordinating Committee in connection with the Commission's port charges scheme, referred to in Part I.

Mr. Basil Sanderson has continued as chairman of the Ports Committee and also as chairman of the Traders' Dock and Harbour Co-ordinating Committee.



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INDEX NUMBER OF SHIPBUILDING PRICES

(1950=100)

Year of Delivery	Deep Sea Cargo Liners and Tramps	Deep Sea Tankers
1937	28	28
1938	33	39
1939	36	44
1940	38	48

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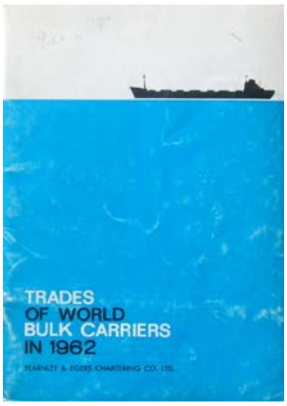
BUNKER COAL PRICES.

Approximate prices at six-monthly intervals.

		Cardiff Best Bunker Smalls Shillings per ton	Cardiff Welsh Large Shillings per ton
1938 Jan.	..	19/3	
July	..	17/6	
1939 Jan.	..	17/-	22/-
July	..	17/-	—

- ***Fearnley & Egers. Trades of world bulk cargoes in 1962***



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TABLES

TRADES OF WORLD BULK CARRIERS IN 1962

This publication is the third in the series "TRADES OF WORLD BULK CARRIERS", which aims at illustrating the development in the seaborne trades of the main bulk commodities as well as the participation of the different types of Bulk Carriers in these trades.

It is not our intention and it is not within the scope of this publication to make forecasts, but we are certain that the information given will be of constructive use as basis for forecasts and adding to the general knowledge of bulk commodity trades.

Table C. MANGANESE ORE. Total seaborne trade 1962.

Figures in 1000 metric tons.

From: / To:	UK	Germany	Italy	Other EEC	USA	Japan	Others	World 1962	World 1961	World 1960
India/Goa	125	104	27	80	191	255	100	885	1120	1314
Brazil	-	7	-	19	807	-	30	863	810	867
South Africa	101	146	10	269	153	40	120	839	770	881
Other Africa	60	176	45	429	452	-	100	1262	1505	1567
Soviet	128	65	16	130	-	25	150	514	410	444
Not specified	62	8	5	30	120	75	100	400	340	286
World 1962	479	506	103	957	1723	395	600	4763		
World 1961	480	486	139	1058	1720	369	703		4955	
World 1960	531	480	139	1047	1954	240	968			5359

Table D. GRAIN. Total seaborne trade 1962.

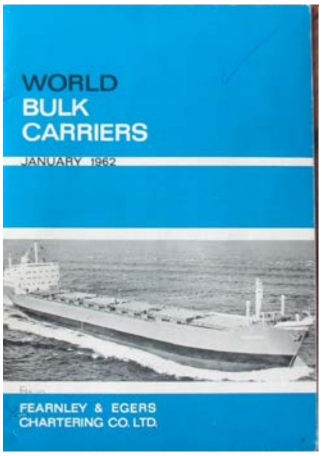
Figures in 1000 metric tons.

Table E. GRAIN. Shipments by Bulk Carriers 1962.

Figures in 1000 metric tons.

To:	USA	Canada	Argentina	Australia	Others	World 1962	World 1961	World 1960
UK	690	600	40	10	30	1370	825	184
Continent	4220	880	150	80	200	5530	1677	1765
Mediterranean	1090	50	140	90	30	1400	1327	585
Scandinavia	100	50	-	30	-	180	108	41
East Europe	170	260	-	-	-	430	129	52
Other Europe	20	-	-	-	-	20	75	40
Africa	50	-	-	20	-	70	52	20
Near East	1480	20	-	-	40	1540	623	118
Indian Ocean	380	-	-	40	10	430	574	80
Far East	1050	960	190	460	110	2770	2061	864

- ***Fearnley & Egers. World bulk carriers 1962***



WORLD BULK CARRIERS

JANUARY 1962

This publication gives statistics of the world Bulk Carrier fleet as per 1.1.1962 and comprises statistics regarding existing vessels as well as vessels on order. All information is carefully collected from reliable first hand sources.

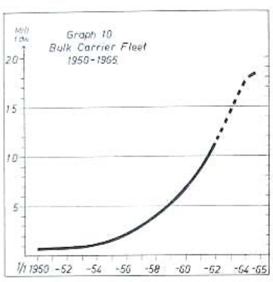
The term «Bulk Carriers» is not always uniformly defined. For this reason we emphasize that in this publication the definition of Bulk Carriers is all oceangoing, singledeck dry cargo vessels. For practical purposes the survey is limited to vessels of 10 000 t.dw. and above. Further, we have found it suitable to divide the fleet into Ore Carriers (vessels specially built for carrying ore cargoes and usually with a small cubic per t.dw.), and Other Bulk Carriers.

The graphs show Ore Carriers at the top in light blue colour and Other Bulk Carriers at the bottom in heavy blue colour.

Graph 1 serves as an introduction to the detailed examination on the following pages. The comparable figures a year ago were:

Existing fleet 471 vessels, 8 711 000 t.dw.
On order 233 vessels, 4 980 000 t.dw.

DEVELOPMENT 1950—1965

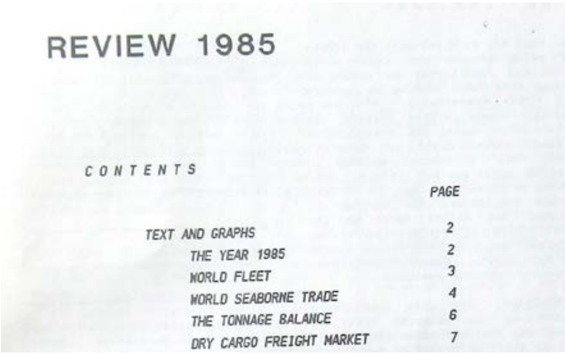


Existing Fleet 1.1.1962.

Countries	All Bulk Carriers No.	All Bulk Carriers '000 t.dw.	All Bulk Carriers %	Ore Carriers No.	Ore Carriers '000 t.dw.	Ore Carriers %	Other Bulk Carriers No.	Other Bulk Carriers '000 t.dw.	Other Bulk Carriers %
Liberia	89	2 451	21.2	47	1 672	28.8	42	779	13.5
Norway	103	1 957	16.9	30	627	10.8	73	1 330	23.1
U.K.	81	1 317	11.4	49	819	14.1	32	498	8.6
Sweden	49	935	8.1	41	787	13.5	8	148	2.6
Japan	52	887	7.7	34	637	11.0	18	250	4.3
U.S.A.	50	772	6.7	12	263	4.5	38	509	8.8
Italy	36	585	5.0	4	61	1.1	32	524	9.1
Greece	29	582	5.0	6	140	2.4	23	442	7.7
Panama	27	464	4.0	14	225	3.9	13	239	4.2
Germany	22	418	3.6	9	183	3.2	13	235	4.1
Netherlands	19	337	2.9	4	95	1.6	15	242	4.2
France	12	206	1.8	10	178	3.1	2	28	0.5
Australia	14	169	1.5	4	66	1.1	10	103	1.8
Others	28	485	4.2	3	53	0.9	25	432	7.5
World	611	11 565	100.0	267	5 806	100.0	344	5 759	100.0

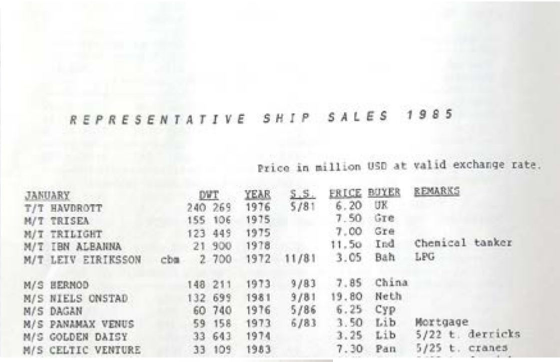
Vessels on order 1.1.1962.

- ***Fearnleys. Review 1985***



REVIEW 1985

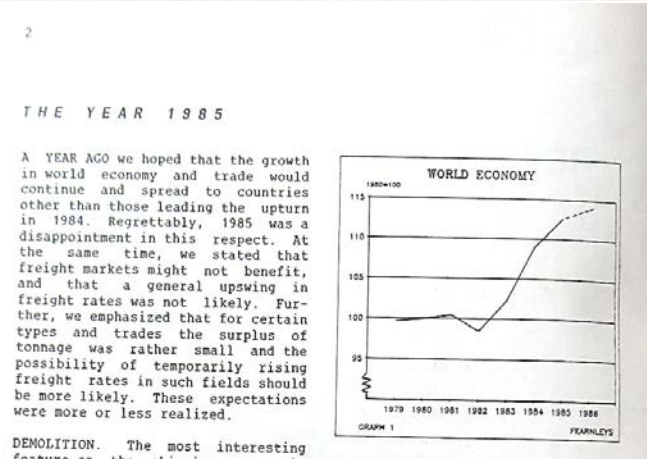
CONTENTS



REPRESENTATIVE SHIP SALES 1985

Price in million USD at valid exchange rate.

JANUARY		DWT	YEAR	S.S.	PRICE	BUYER	REMARKS
T/T HAVDROTT		240 269	1976	5/81	6.20	UK	
M/T TRISEA		155 106	1975		7.50	Gre	
M/T TRILIGHT		123 449	1975		7.00	Gre	
M/T IBN ALBANNA		21 900	1978		11.5o	Ind	Chemical tanker
M/T LEIV EIRIKSSON	cbm	2 700	1972	11/81	3.05	Bah	LPG
M/S HERMOD		148 211	1973	9/83	7.85	China	
M/S NIELS ONSTAD		132 699	1981	9/81	19.80	Neth	
M/S DAGAN		60 740	1976	5/86	6.25	Cyp	
M/S PANAMAX VENUS		59 158	1973	6/83	3.50	Lib	Mortgage
M/S GOLDEN DAISY		33 643	1974		3.25	Lib	5/22 t. derricks
M/S CELTIC VENTURE		33 109	1983		7.30	Pan	5/25 t. cranes



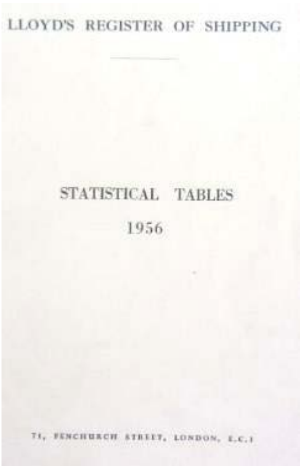
2

THE YEAR 1985

A YEAR AGO we hoped that the growth in world economy and trade would continue and spread to countries other than those leading the upturn in 1984. Regrettably, 1985 was a disappointment in this respect. At the same time, we stated that freight markets might not benefit, and that a general upswing in freight rates was not likely. Further, we emphasized that for certain types and trades the surplus of tonnage was rather small and the possibility of temporarily rising freight rates in such fields should be more likely. These expectations were more or less realized.

DEMOLITION. The most interesting

- ***Lloyd's Register of Shipping. Statistical Tables 1956***

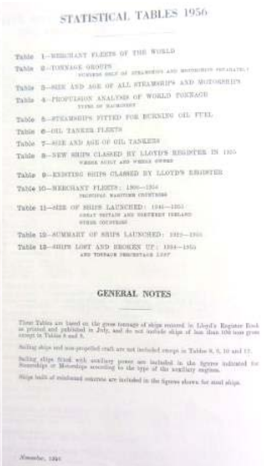


LLOYD'S REGISTER OF SHIPPING

STATISTICAL TABLES

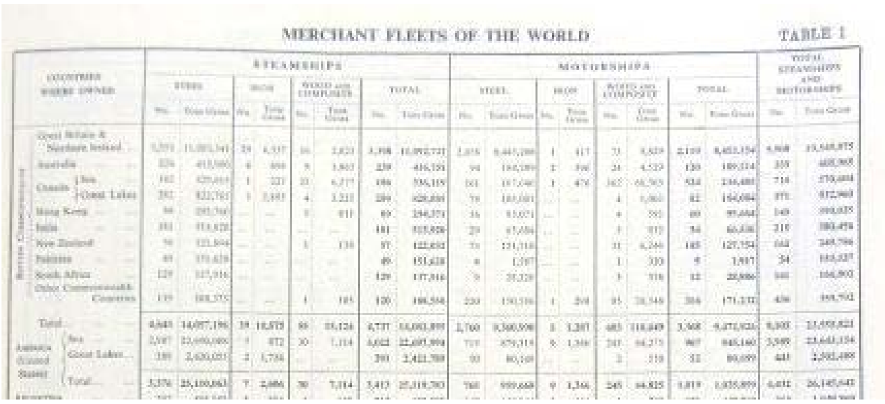
1956

71, FENCHURCH STREET, LONDON, E.C.3



STATISTICAL TABLES 1956

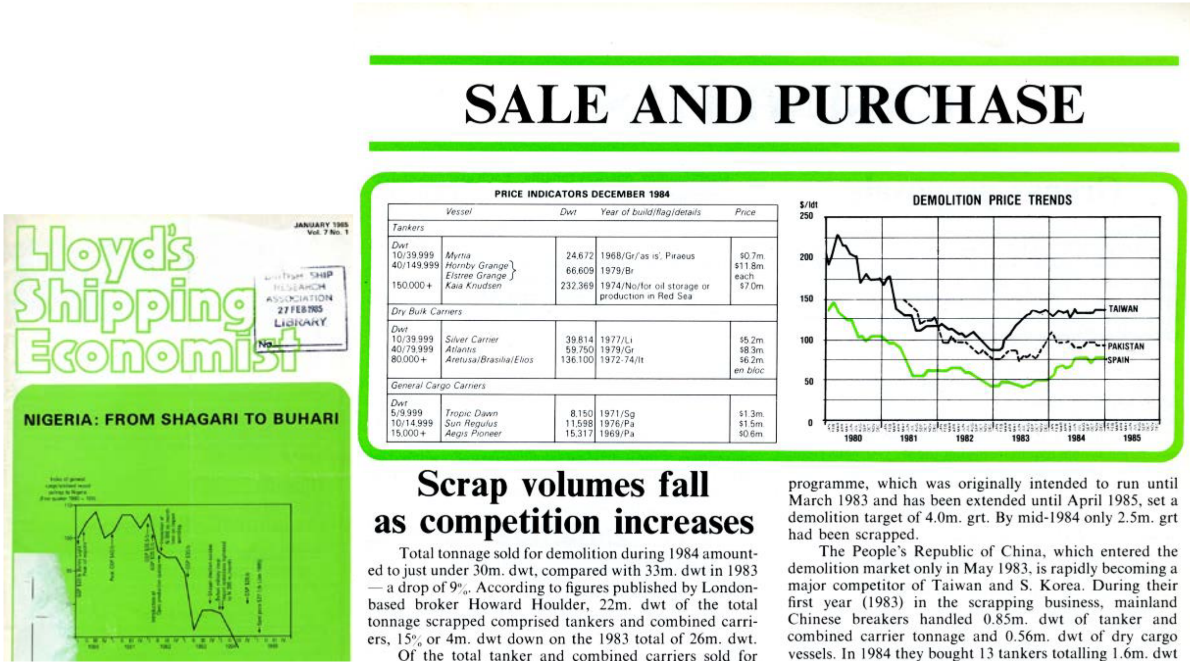
GENERAL NOTES



MERCHANT FLEETS OF THE WORLD

TABLE 1

- ***Lloyd's Shipping Economist. 1985***



SALE AND PURCHASE

PRICE INDICATORS DECEMBER 1984

	Vessel	Dwt	Year of build/flag/details	Price
Tankers				
Dwt 10/39,999	*Myrtia*	24,672	1968/Gr/'as is', Piraeus	$0.7m.
40/149,999	*Hornby Grange* } *Elstree Grange* }	66,609	1979/Br	$11.8m. each
150,000+	*Kaia Knudsen*	232,369	1974/No/for oil storage or production in Red Sea	$7.0m.
Dry Bulk Carriers				
Dwt 10/39,999	*Silver Carrier*	39,814	1977/Li	$5.2m.
40/79,999	*Atlantis*	59,750	1979/Gr	$8.3m.
80,000+	*Aretusa/Brasilia/Elios*	136,100	1972-74/It	$6.2m. *en bloc*
General Cargo Carriers				
Dwt 5/9,999	*Tropic Dawn*	8,150	1971/Sg	$1.3m.
10/14,999	*Sun Regulus*	11,598	1976/Pa	$1.5m.
15,000+	*Aegis Pioneer*	15,317	1969/Pa	$0.6m.

Scrap volumes fall as competition increases

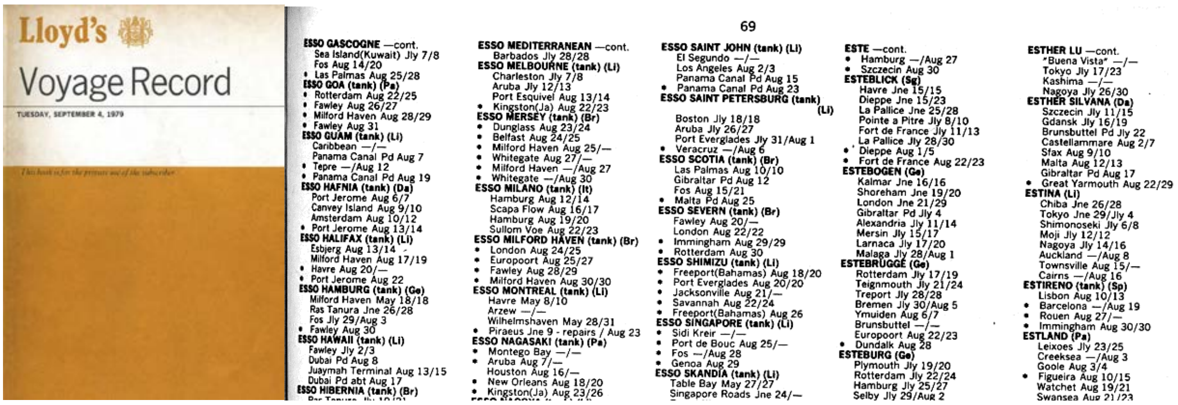
Total tonnage sold for demolition during 1984 amounted to just under 30m. dwt, compared with 33m. dwt in 1983 — a drop of 9%. According to figures published by London-based broker Howard Houlder, 22m. dwt of the total tonnage scrapped comprised tankers and combined carriers, 15% or 4m. dwt down on the 1983 total of 26m. dwt.

Of the total tanker and combined carriers sold for

programme, which was originally intended to run until March 1983 and has been extended until April 1985, set a demolition target of 4.0m. grt. By mid-1984 only 2.5m. grt had been scrapped.

The People's Republic of China, which entered the demolition market only in May 1983, is rapidly becoming a major competitor of Taiwan and S. Korea. During their first year (1983) in the scrapping business, mainland Chinese breakers handled 0.85m. dwt of tanker and combined carrier tonnage and 0.56m. dwt of dry cargo vessels. In 1984 they bought 13 tankers totalling 1.6m. dwt

- ***Lloyd's Voyage Record 1979*** [the dullest front cover ever used on a periodical?!]



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ESSO GASCOGNE —cont.
Sea Island(Kuwait) Jly 7/8
Fos Aug 14/20
• Las Palmas Aug 25/28
ESSO GOA (tank) (Pa)
• Rotterdam Aug 22/25
• Fawley Aug 26/27
• Milford Haven Aug 28/29
• Fawley Aug 31
ESSO GUAM (tank) (Li)
Caribbean —/—
Panama Canal Pd Aug 7
• Tepre —/Aug 12
• Panama Canal Pd Aug 19
ESSO HAFNIA (tank) (Da)
Port Jerome Aug 6/7
Canvey Island Aug 9/10
Amsterdam Aug 10/12
• Port Jerome Aug 13/14
ESSO HALIFAX (tank) (Li)
Esbjerg Aug 13/14
Milford Haven Aug 17/19
• Havre Aug 20/—
• Port Jerome Aug 22
ESSO HAMBURG (tank) (Ge)
Milford Haven May 18/18
Ras Tanura Jne 26/28
Fos Jly 29/Aug 3
• Fawley Aug 30
ESSO HAWAII (tank) (Li)
Fawley Jly 2/3
Dubai Pd Aug 8
Juaymah Terminal Aug 13/15
Dubai Pd abt Aug 17
ESSO HIBERNIA (tank) (Br)

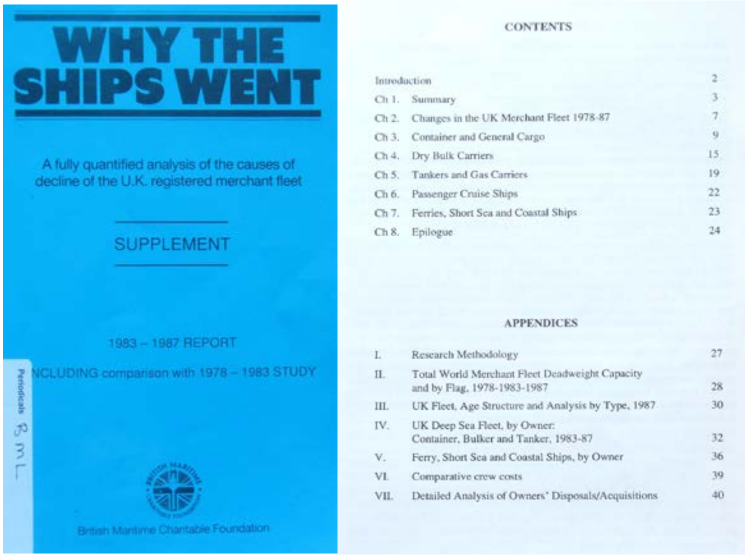
ESSO MEDITERRANEAN —cont.
Barbados Jly 28/28
ESSO MELBOURNE (tank) (Li)
Charleston Jly 7/8
Aruba Jly 12/13
Port Esquivel Aug 13/14
• Kingston(Ja) Aug 22/23
ESSO MERSEY (tank) (Br)
• Dunglass Aug 23/24
• Belfast Aug 24/25
• Milford Haven Aug 25/—
• Whitegate Aug 27/—
• Milford Haven —/Aug 27
• Whitegate —/Aug 30
ESSO MILANO (tank) (It)
Hamburg Aug 12/14
Scapa Flow Aug 16/17
Hamburg Aug 19/20
Sullom Voe Aug 22/23
ESSO MILFORD HAVEN (tank) (Br)
• London Aug 24/25
• Europoort Aug 25/27
• Fawley Aug 28/29
• Milford Haven Aug 30/30
ESSO MONTREAL (tank) (Li)
Havre May 8/10
Arzew —/—
Wilhelmshaven May 28/31
• Piraeus Jne 9 - repairs / Aug 23
ESSO NAGASAKI (tank) (Pa)
• Montego Bay —/—
• Aruba Aug 7/—
Houston Aug 16/—
• New Orleans Aug 18/20
• Kingston(Ja) Aug 23/26

ESSO SAINT JOHN (tank) (Li)
El Segundo —/—
Los Angeles Aug 2/3
Panama Canal Pd Aug 15
• Panama Canal Pd Aug 23
ESSO SAINT PETERSBURG (tank) (Li)
Boston Jly 18/18
Aruba Jly 26/27
Port Everglades Jly 31/Aug 1
• Veracruz —/Aug 6
ESSO SCOTIA (tank) (Br)
Las Palmas Aug 10/10
Gibraltar Pd Aug 12
Fos Aug 15/21
• Malta Pd Aug 25
ESSO SEVERN (tank) (Br)
Fawley Aug 20/—
London Aug 22/22
• Immingham Aug 29/29
• Rotterdam Aug 30
ESSO SHIMIZU (tank) (Li)
• Freeport(Bahamas) Aug 18/20
• Port Everglades Aug 20/20
• Jacksonville Aug 21/—
• Savannah Aug 22/24
• Freeport(Bahamas) Aug 26
ESSO SINGAPORE (tank) (Li)
• Sidi Kreir —/—
• Port de Bouc Aug 25/—
• Fos —/Aug 28
• Genoa Aug 29
ESSO SKANDIA (tank) (Li)
Table Bay May 27/27
Singapore Roads Jne 24/—

ESTE —cont.
• Hamburg —/Aug 27
• Szczecin Aug 30
ESTEBLICK (Sg)
Havre Jne 15/15
Dieppe Jne 15/23
La Pallice Jne 25/28
Pointe a Pitre Jly 8/10
Fort de France Jly 11/13
La Pallice Jly 28/30
• Dieppe Aug 1/5
• Fort de France Aug 22/23
ESTEBOGEN (Ge)
Kalmar Jne 16/16
Shoreham Jne 19/20
London Jne 21/29
Gibraltar Pd Jly 4
Alexandria Jly 11/14
Mersin Jly 15/17
Larnaca Jly 17/20
Malaga Jly 28/Aug 1
ESTEBRÜGGE (Ge)
Rotterdam Jly 17/19
Teignmouth Jly 21/24
Treport Jly 28/28
Bremen Jly 30/Aug 5
Ymuiden Aug 6/7
Brunsbuttel —/—
Europoort Aug 22/23
• Dundalk Aug 28
ESTEBURG (Ge)
Plymouth Jly 19/20
Rotterdam Jly 22/24
Hamburg Jly 25/27
Selby Jly 29/Aug 2

ESTHER LU —cont.
"Buena Vista" —/—
Tokyo Jly 17/23
Kashima —/—
Nagoya Jly 26/30
ESTHER SILVANA (Da)
Szczecin Jly 11/15
Gdansk Jly 16/19
Brunsbuttel Pd Jly 22
Castellammare Aug 2/7
Sfax Aug 9/10
Malta Aug 12/13
Gibraltar Pd Aug 17
• Great Yarmouth Aug 22/29
ESTINA (Li)
Chiba Jne 26/28
Tokyo Jne 29/Jly 4
Shimonoseki Jly 6/8
Moji Jly 12/12
Nagoya Jly 14/16
Auckland —/Aug 8
Townsville Aug 15/—
Cairns —/Aug 16
ESTIRENO (tank) (Sp)
Lisbon Aug 10/13
• Barcelona —/Aug 19
• Rouen Aug 27/—
• Immingham Aug 30/30
ESTLAND (Pa)
Leixoes Jly 23/25
Creeksea —/Aug 3
Goole Aug 3/4
• Figueira Aug 10/15
Watchet Aug 19/21

- ***Why the ships went. 1983-1987***.



WHY THE SHIPS WENT

A fully quantified analysis of the causes of decline of the U.K. registered merchant fleet

SUPPLEMENT

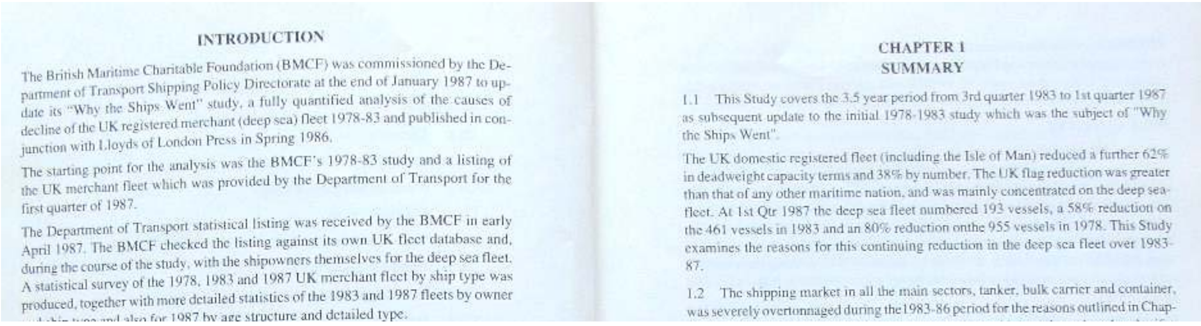
1983 – 1987 REPORT

INCLUDING comparison with 1978 – 1983 STUDY

British Maritime Charitable Foundation

CONTENTS

APPENDICES



INTRODUCTION

The British Maritime Charitable Foundation (BMCF) was commissioned by the Department of Transport Shipping Policy Directorate at the end of January 1987 to update its "Why the Ships Went" study, a fully quantified analysis of the causes of decline of the UK registered merchant (deep sea) fleet 1978-83 and published in conjunction with Lloyds of London Press in Spring 1986.

The starting point for the analysis was the BMCF's 1978-83 study and a listing of the UK merchant fleet which was provided by the Department of Transport for the first quarter of 1987.

The Department of Transport statistical listing was received by the BMCF in early April 1987. The BMCF checked the listing against its own UK fleet database and, during the course of the study, with the shipowners themselves for the deep sea fleet. A statistical survey of the 1978, 1983 and 1987 UK merchant fleet by ship type was produced, together with more detailed statistics of the 1983 and 1987 fleets by owner and ship type and also for 1987 by age structure and detailed type.

CHAPTER 1
SUMMARY

1.1 This Study covers the 3.5 year period from 3rd quarter 1983 to 1st quarter 1987 as subsequent update to the initial 1978-1983 study which was the subject of "Why the Ships Went".

The UK domestic registered fleet (including the Isle of Man) reduced a further 62% in deadweight capacity terms and 38% by number. The UK flag reduction was greater than that of any other maritime nation, and was mainly concentrated on the deep sea-fleet. At 1st Qtr 1987 the deep sea fleet numbered 193 vessels, a 58% reduction on the 461 vessels in 1983 and an 80% reduction onthe 955 vessels in 1978. This Study examines the reasons for this continuing reduction in the deep sea fleet over 1983-87.

1.2 The shipping market in all the main sectors, tanker, bulk carrier and container, was severely overtonnaged during the 1983-86 period for the reasons outlined in Chap-

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