

# The Shipping Industry Market Review

## 航運界市場回顧



The world fleet of all ships over 300 gross tons (gt) at 1 January 2020 consisted of 55,655 ships of 1,970 million deadweight tonnes, 1,320 million gt or 25.227 million TEU, an increase of 983 ships, 81 million deadweight tonnes or 889 thousand TEU on the year before. 1,445 newbuildings of 97.4 million deadweight tonnes were delivered in 2019, and 442 ships of 14.8 million deadweight tonnes were sent to the breakers. Interestingly, by deadweight tonnes, bulk carriers made up 37.5% of newbuildings and 48.9% of ships sent for recycling, while tankers made up 46.9% of newbuildings and 26.7% of ships sent for recycling. Over the past 3 years, the world fleet has increased by 4.9% in number of ships and 10.8% in deadweight tonnes.

It is also interesting to note that by a very simplistic calculation, total deadweight divided by total number of ships, the average deadweight per ship has increased from 33,530 tonnes to 35,406 tonnes over the past 3 years, evidence that ship sizes continue to get larger.

World seaborne trade increased year-on-year by **1.1%** in 2019 to **11,939 million tonnes**. Over the past three years, world seaborne trade in tonnes has increased by **8.2%**.

The Hong Kong fleet of ships over 1,000 gt as on 1 January 2020 was **997** ships of **39.784 million deadweight tonnes** with an average age of **15.2 years**, which puts it in the position of being the world's **12th** largest (2019: 12th). Out of the top 15 places of control, Hong Kong has by far the largest percentage of its fleet under the local Ship Register. The average age of the world fleet of ships over 1,000 gt as of 1 January 2020 was **15.1 years**.

In terms of the Gross Tonnage and Deadweight of vessels of over 300 gt at 1 January 2020, Hong Kong was again the **4th** largest ship register, coming after Panama, Liberia and the Marshall Islands, and followed by Singapore, Malta and the Mainland China. The deadweight tonnage of ships flying the Hong Kong twin flags represented **10.2%** of the world total.

(All statistics taken from Shipping Statistics and Market Review, Volume 64, No. 1/2 - 2020, Institute of Shipping Economics and Logistics)

截止 2020 年 1 月 1 日，全球 300 總噸以上的商船數量是 55,655 艘，合計 19.7 億載重噸、13.2 億總噸或 2,522.7 萬標箱，較去年同期增長 983 艘、8,100 萬載重噸或 88.9 萬標箱。2019 年共有 1,445 艘合 9740 萬載重噸的新船交付，約 442 艘合 1480 萬載重噸的船舶拆船。有趣的是，在交付的新船中，以載重噸計算，散貨船約佔 37.5%，油輪約佔 46.9%，而以拆船的載重噸位計算，則分別佔 48.9% 和 26.7%。過去三年，世界船隊增幅以艘次計算約佔 4.9%，但以載重噸計算約佔 10.8%。

如果以載重總量除以船舶總數，就能簡單地得出過去三年單船載重噸增幅是 33,530 至 35,406 載重噸，證明船體規模增大的趨勢繼續存在。

2019 年世界海運貿易量同比增加 **1.1%** 達 **119.39 億噸**。過去三年，世界海運噸貿易量增加了 **8.2%**。

截止 2020 年 1 月 1 日，香港超過 1000 總噸的船舶數量為 **997 艘** 合計 **3,978.4 萬載重噸**，平均船齡為 **15.2 年**，位居世界 **第十二位** (2019 年為第十二位)。而在世界前十五位船舶控制地區中，香港是本地註冊船舶數量最多的地區。截止 2020 年 1 月 1 日，世界船隊平均船齡為 **15.1 年**。

截止 2020 年 1 月 1 日，世界超過 300 總噸的船舶總噸和載重噸排位，香港繼續位居 **第四**，僅次於巴拿馬、利比里亞和馬紹爾群島，緊隨其後的是新加坡、馬耳他和中國內地。香港註冊的船舶載重噸總量約佔世界總量的 **10.2%**。

(數據來源：航運經濟與物流研究所出版的《航運統計和市場回顧》2020 年第 1、2 期第 64 欄)

