

COMMISSION OF THE EUROPEAN COMMUNITIES

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REPORT FROM THE COMMISSION TO THE COUNCIL

**ON THE STATE
OF
THE SHIPBUILDING INDUSTRY
IN THE COMMUNITY**

SITUATION IN 1990

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I. INTRODUCTION

This report, issued pursuant to the Council Resolution of 19 September 1978, is aimed at providing an overview of the shipbuilding industry and market in 1990.

The year saw confirmation of a sectoral upturn first apparent in 1988 and strengthening through 1989.

II. GENERAL ECONOMIC BACKGROUND

The slowdown in world economic activity, which had begun at the end of 1988, continued in 1990. World output increased during the year by only 2% in real terms, half the rate of increase of 1988. The slowdown was particularly pronounced in the USA, where real GNP increased by just 1%, and in the countries of Central and Eastern Europe where the inevitable restructuring led to a temporary decline of output. In Japan, however, growth remained very strong with GNP expanding by 5,6% in real terms. In the Community, the deterioration of the external environment was partly offset by the growth impulses emanating from German unification and real GDP increased by 2,7%.

The deceleration of growth is expected to continue into 1991, with a modest recovery taking place only in the second half of the year. As a result, world economic activity is expected to expand this year by only 1%. Growth is also expected to decelerate in the Community. Most countries, however, should experience only a moderate deceleration from the growth rates of 1990, while in the United Kingdom the recession is turning out to be much more severe than anticipated. As a result, average Community GDP is projected to increase by only 1 1/4% in 1991.

World trade grew in 1990 by 4,6% (increase in real imports of goods) with the Community contributing positively to its expansion with an increase of its imports of 5,5% in real terms. This trend is expected to continue in 1991, albeit at a weaker level, with Community imports going up by 4% in real terms and imports by the rest of the world increasing by less than 3%. Overall, real world trade should grow by 3 1/4% in 1991.

The slowdown in output and trade will take its toll on investment. While in Japan investment is still expected to expand by about 5% in real terms in 1991, down markedly from the 10.8% recorded in 1990, investment in the USA is projected to decline by more than 3%. In the Community, investment is further depressed by the need, in most countries, to maintain a cautious policy stance; as a result, investment in the EC is expected to increase on average by only about 1% in 1991 with investment in equipment actually stagnating.

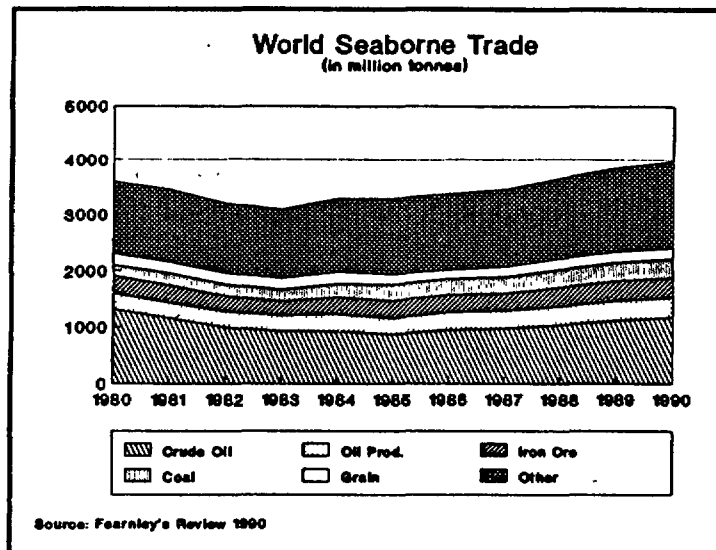
III. SHIPPING TRENDS

World seaborne trade movement saw a new record in 1990 (whilst growth was slower in 1989) following the upward trend, which started in 1984/85.

In terms of tonnes world seaborne trade volume increased by 3,0% in 1990 after 5,0% in 1989, from 3.860 million tonnes to a new record of 3.975 million tonnes.

In tonne-mile the increase was slightly higher, about 4% (compared to 7% in 1989), from 16.402 billion tonne-miles in 1989 to 17.035 billion in 1990. However, the record level of 1979 with 17.513 billion tonne-miles, was not reached (see annex 1, table 1).

Fig. 1.



Source: Fearnleys Review 1990

As in 1989, crude oil shipments contributed most to the increase, with about 6,5% in terms of tonne-miles, followed by oil products (4,5%), coal (4,3%), other cargo (3,5%) and grain (2,7%). Iron ore shipments on the other hand decreased by about 3,5%.

Freight rate developments in 1990 were heterogeneous. The overall market pattern in 1990 was similar to 1989, with a strong first quarter during which freight rates exceeded level for the equivalent quarter in 1989. The second quarter was weaker than in 1989 and the third quarter

trailed significantly. The Gulf crisis unsurprisingly had the greatest impact on tanker rates with rates varying according to type of trade and vessels: VLCCs experienced their best rates for a number of years whilst rates for other tankers were on average fairly strong. By contrast general cargo tonnage underwent a weakening freight market throughout the year.

IV. FLEET TRENDS

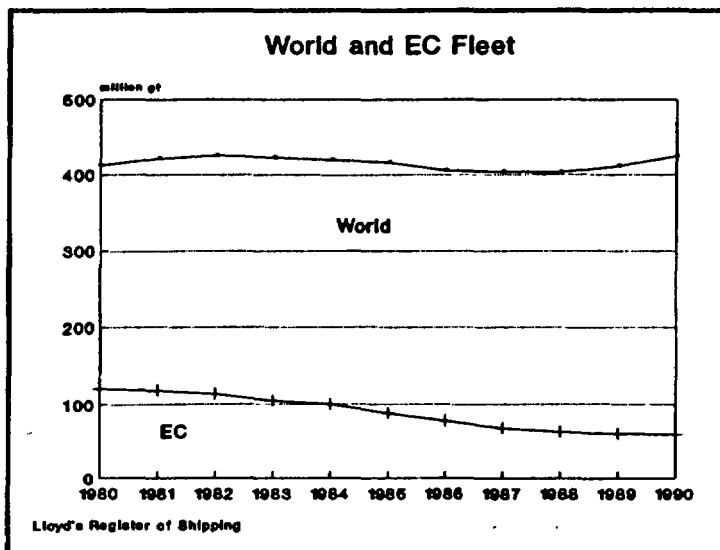
The growth trend, which started in 1988 continued and the world fleet increased from 410,5 million gt in 1989 to 423,6 million gt in 1990 (see annex 1, table 3).

Tankers and bulk carriers contributed mainly to this increase, whereas the combined carrier fleet decreased, like in 1989.

Although tonnage broken up and lost in 1990 was higher than in 1989, the level still remains low for the third consecutive year.

Supply of tonnage was with 3,2% higher in 1990 than in 1989 with 1,8% (in gt terms). Despite this increase, the tonnage balance improved nevertheless, as demollions, tonnage broken up and lost led to a net fleet increase of 2.7%, whereas seaborne trade (in tonne-miles) increased by 4%.

Fig. 2.



Although seaborne trade and the world fleet experienced further growth, the EC fleets continued to decline. In 1989 the Community fleets, with 59,9 million gt, represented still 14,6% of the world merchant fleet. In 1990 the EC's share fell, however, further to 14%, as the fleets in the Community shrunk to 59,1 million gt and as the world fleet grew from 410,5 million gt to 423,6 million gt.

V. SITUATION IN THE SHIPBUILDING INDUSTRY

A. General overview

In 1990 world shipbuilding production increased in cgt terms by 18.0% against 14.9% in 1989.

During the first three quarters of 1990 the demand in the shipbuilding sector was characterized by optimism, especially with regard to the tanker market. The rising demand for double hull tankers - in the light of the US Pollution Act of 1990 with its strict requirements for the future design of tankers entering an US harbour - was one of the main reasons behind this development. But expectations about rising newbuilding prices and the assumption of a possible lack of available building berths were other factors influencing shipowners not to postpone or even to anticipate the placing of new orders.

In the fourth quarter of 1990, the optimism gave, however, way to the fear that the Gulf-crisis would have a major impact on the shipping and shipbuilding sector. Although the volume of new-orders declined during the fourth quarter of 1990, one cannot exclude that this development is also a reaction to the combined effect of less available yard capacity on short term, price rises during the first half of the year, a widening gap between freight rates and ship prices, and especially in the fourth quarter a strengthening of the Yen. A certain lack of funding for newbuildings became also apparent, and may have equally dampened demand for newbuildings.

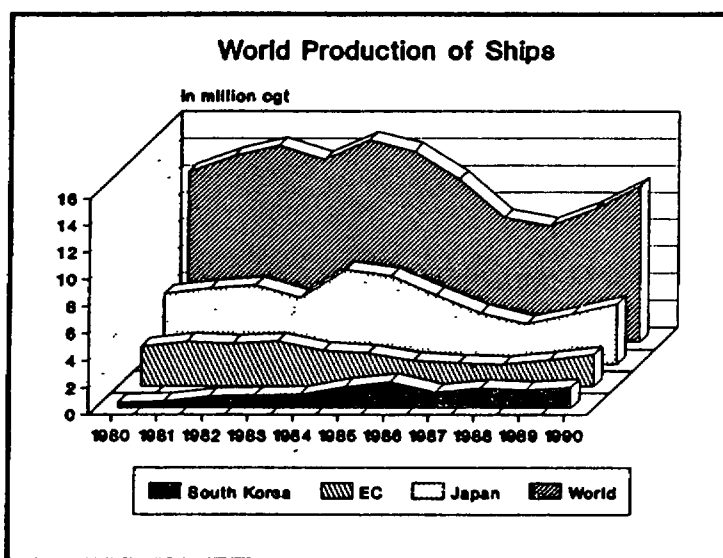
1. Production

Production in 1990 increased by 18% against 14.9% in 1989. Nearly 11.7 million cgt were completed after 9.9 million cgt in 1989 (see annex 1, table 5a).

A breakdown by tonnage of 1990 construction figures for the main categories of ship shows more than half of deliveries being accounted for by:

- bulk carriers (21.8% of world production);
- product and chemicals carriers (11.4%)
- general cargo ships (10.5%);
- oil tankers (10%).

Fig. 3.



Source: Commission/Lloyd's Maritime Services Contract

2. Prices

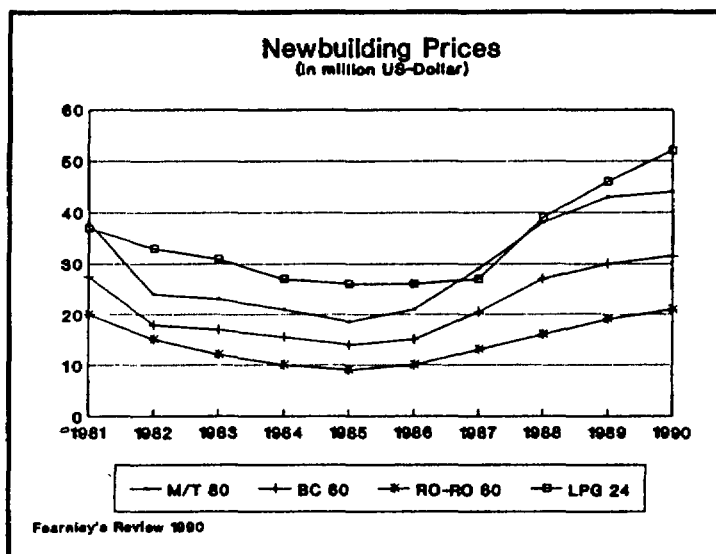
The trend of rising newbuilding prices, which started in 1985, became less pronounced. It remained in evidence, however, in the case of certain categories of ship, notably ultra-large crude carriers, oil/bulk/ore carriers and LNG carriers.

At the beginning of 1990 prices did still increase on a US-Dollar basis, and remained then stable throughout the year for most ship types.

With prices for second hand vessels showing a decreasing tendency, with financing becoming ever more difficult, with a widening gap between freight rates and newbuilding prices, and with the Gulf crisis in the third quarter of 1990, the possibility for price increases became rather limited.

Japan's prices, quoted in Yen, showed, however, a stronger increase until second half of the year. Especially in Spring 1990, when the Yen weakened against the US-Dollar to above 150 Yen/Dollar, orders placed with Japanese yards increased strongly, allowing the yards to ask for higher prices. When the Yen started to appreciate again against the US-Dollar in the third quarter of 1990, this and the generally reduced demand for newbuildings led in turn and in some cases to certain price reductions in Yen. But as prices in US-Dollar remained rather stable, and as the European currencies became weaker against the US-Dollar, prices in European currencies had to follow this development and had to be adopted downwards.

Fig. 4.



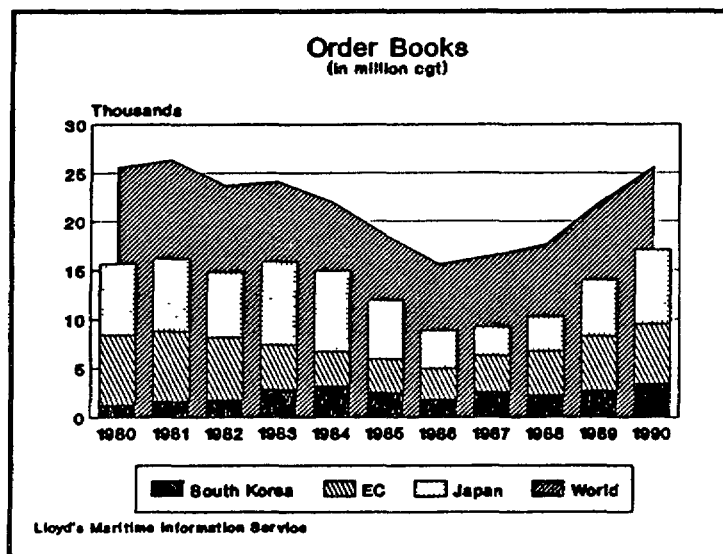
Source: Fearnley's Review 1990 (see annex 1, table 4).

3. New orders and order books

After 1989, where new orders increased by 48,6% on a cgt basis, 1990 saw a growth of 5,4% (see annex 1, table 6a).

As the intake of about 14,3 million cgt in new orders was higher than the annual production with 11,7 million cgt, order books increased further. At the end of 1990 they were 16,7% higher than at the end of 1989.

Fig. 5.



Source: Commission/Lloyd's Maritime Information Services Contract

4. Supply and demand

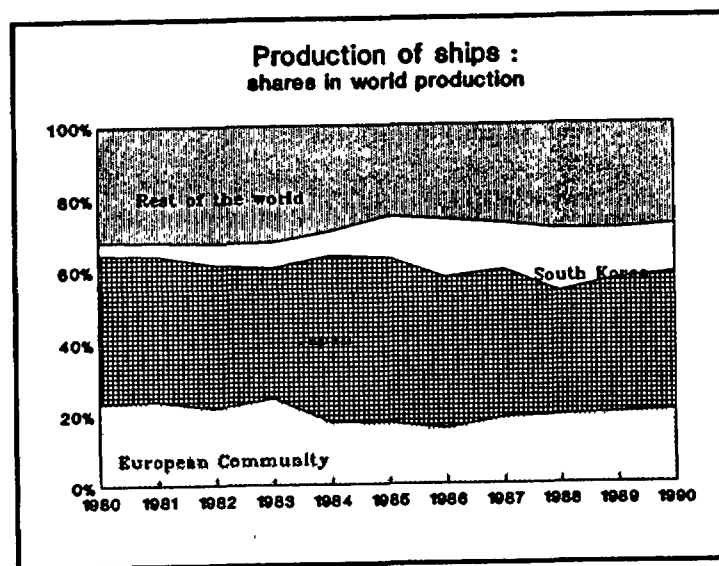
Against this background of still recovering shipbuilding prices and filled order books, it is evident that the current trend towards a possibly balance between supply and demand in the industry is starting to show a certain improvement. For the future this equilibrium depends most of all on the willingness of all shipbuilders to abstain from substantially increasing their building capacity through the opening of new or previously mothballed yards.

B. Situation in the Community, Japan and South Korea

1. The Community

The EC's production market-share increased slightly from 19,8% in 1989 to 20,2% in 1990, as production rose with 20,8% against 18% for the world.

Fig. 6.



Source: Commission/Lloyd's Maritime Information Services Contract

The most important market segments of the production were:

- Full Container Ships representing 18,4% of the Community production
- General Cargo Ships representing 14,4% of the Community production
- Passenger Ships representing 13,4% of the Community production
- Fishing Vessels representing 8,9% of the Community production
- Product & Chemical Carriers representing 8,5% of the CE production.

In the yards of what used to be the German Democratic Republic, 45% of production was accounted for by fishing vessels and 35.4% by general cargo ships.

However, as far as new orders are concerned, the EC ended the year 1990 with a market share of 19,3% against 20,3% in 1989, worth mentioning, however, that new orders for oil tankers, which rose by 112% on world level, increased by 147% as far as the Community is concerned. The EC reached thus a world market share of above 13%. Also in the bulk carrier segment the EC's share improved from 2,9 in 1989 to 12,6 in 1990. In cgt terms, new orders for EC yards grew by 192%, whereas on the international scale orders for this ship type declined from 2.5 mio. cgt in 1989 to 1.6 mio cgt in 1990 (see annex 1, table 8).

Orderbooks mirror the situation of the intake of new orders. On a world level, the increase against 1989 was 16,7%. For the EC, however, orderbooks increased by 10,3% and the EC saw its world market share reduced from 25,1% to 23,7%.

Most yards have enough orders (extrapolating from current production capacity) to keep them busy for at least two years and, in the case of certain categories of ship (those with the highest value added, i.e. cruise ships), even for part of 1993.

2. Japan

Production in Japan increased by 21.6% in 1990 against 24.1% in 1989. The country's world market share increased thereby from 37.1% in 1989 to 38.2% in 1990. This increase, larger than that in either the Community or Korea, is attributable, inter alia, to better utilization of existing resources and greater cooperation between large and medium-sized yards.

With regard to new orders, Japan's market share did even decline from 43,3% in 1989 to 42,8% in 1990, as new orders placed with yards in Japan increased by only 4% against 5,4% for the world.

Although the increase in orderbooks was with 31,6% less than half of the result in 1989 (64%), Japan improved its world market share from 25,9% to 29,2%.

3. South Korea

South Korea's production increase of 12,6% was not sufficient to maintain its 1989 world market of 14,1%. South Korea's share declined thus to 13,4%.

However, the intake of new orders grew by 29,8%, leaving the country with a market share of 15,2% at the end of 1990 against 12,3% one year before.

The situation of the orderbooks improved equally, with an increase of 24,4%, and a world market share of 13,6% at the end of 1990 against 12,8% in 1989.

VI. Policy framework

A. External policy

The Community continued its active participation in the multilateral negotiations initiated in September 1989 within OECD Group 6 (of which Korea became a full member at the end of 1990) with a view to conclusion of an international agreement eliminating all obstacles to normal and fair competition in this sector.

On the basis of the mandate given it by the July 1990 Council, the Commission argued that the proposed agreement could only be considered balanced if all obstacles (public and private) to free competition conditions were removed or appropriate solutions were provided for.

The discussions, while producing general agreement on a whole series of questions, remained unresolved on a limited, but politically very important, number of points.

In this context the OECD Council of 5 June 1991, while expressing satisfaction at the progress made to date, was of the view that the parties to the agreement ought to present a draft agreement by July 1991, so that outstanding political differences could be resolved as quickly as possible.

B. Internal policy

1) Maritime industries

In recognising the growing importance of maritime issues, concerning foremost the health of the oceans and its resources and having in mind the continuing decline of the EC fleets and the future of the Community shipbuilding, the Commission presented the communication "New challenges to maritime industries"⁽¹⁾ to the Council, the European Parliament and the Economic and Social Committee. This communication seeks an open discussion on the increasing importance of the Community's maritime dimension and aims to find the EC's answer to current and future challenges. Its primary intention is to develop the relevant maritime issues in the framework of general principles of the Community's industrial policy, as recently explained in the Commission's Communication "Industrial policy in an open and competitive environment"⁽²⁾.

(1) COM(91)335 final1991.

(2) COM(90)556 final, 16 November 1991.

In this context, it is worth mentioning that this Communication does not follow the more traditional approach concentrating on sector specific aspects. Instead, the approach pursued in this Communication is a general and horizontal one, as it addresses the whole maritime dimension - which is of common concern to the different parties involved, namely shipping, shipbuilding, marine equipment and service sectors. In this respect the Commission proposes to create a discussion Forum with all the relevant industries, research bodies, national administrations and the Commission itself. This forum will not only allow for a wideranging dialogue between all parties concerned, but will furthermore prepare a report to the Commission with recommendations about the measures and actions, needed in order to pursue the EC's maritime interests on a viable and long-term basis.

2) Seventh Directive on aid to shipbuilding

On a proposal from the Commission, the Industry Council on 21 December 1990 approved the text of the Seventh Directive on aid to shipbuilding, ahead of expiry of the Sixth Directive on 31 December 1990.

The new Directive, to apply for three years, should ensure the survival of an efficient and competitive European Shipbuilding Industry.

The provisions of the Seventh Directive coincide largely with those of the Sixth Directive.

On 12 December 1990 the Commission, in the light of the continued improvement in world demand of ships and the generalized upswing in prices level, decided to reduce the level of the common maximum aid ceiling for operating aid for large ships to 13% and the level of this aid ceiling for shipnewbuildings with a contract value of less than 10 MECU and for ship conversions to 9%.

3) Research and Development

The application of advance technology and industrial innovation are expected to have a significant effect on the performance of European shipbuilders during the next decade.

European shipbuilders have benefitted from Community funded R&D programmes such as BRIT/EURAM and ESPRIT to meet the industrial challenges, and especially the fierce competition from the Far East.

The Commission services have held several meetings during 1990 with the European Shipbuilding R&D Committee (COREDES). This Committee has recently submitted an outline proposal for a possible integrated project - "EUROSHIP 2000", and which is currently being evaluated by the Commission services.

A call for proposal has recently been sent out by the Commission services for a study on "European Shipbuilding Technological Development for the 1990s" - this study will help to establish future needs and the priority areas for R&D that would lead to improvements of competition.

4) Technical harmonization

The need for technical harmonization of marine equipment has been recognised by the Commission for some time. This is a complex matter since the requirements for marine equipment are based on conventions of the International Marine Organisation (IMO).

During the last year, Commission staff have consulted industrial associations on this matter and a Member States meeting was held in November 1990. Ways are currently being sought to resolve this complex problem in order to eliminate barriers to trade.

Private consultants have recently been engaged to carry out a study of the structure of the marine equipment sector and to evaluate possible barriers to trade.

On the more specific issue of recreational craft, discussions and consultations with industry and governmental experts were held during the year of 1990 and 1991 in view of a possible presentation of a draft Directive based on article 100A of the Treaty.

5) Social Aspects

- Although employment in the shipbuilding industry continued to decrease from 67.368 in 1989 to 66.745 in 1990, the levelling-off of the downward trend already noticed the previous year was fully confirmed.
- This global reduction was due mainly to job cuts in Member States where restructuring had not yet been completely achieved, while those Member States which have gone through an in depth restructuration of the sector showed a slight recovery in terms of employment (see Annex 1, table 11).

6) Regional Aspects

The objective of the RENAVAL Community programme is to support economic activities that generate new jobs outside the sector in regions affected by the restructuring of the shipbuilding industry. Following the terms of this programme, the Commission decided that 26 shipbuilding areas located in 9 Member States qualified for assistance. On the 15 October 1991, 16 corresponding operational programmes were adopted, while the remainder of 10 operational programmes will be approved before the end of 1991. The total budgetary commitment under Renaval will then amount to some 300 MECU (see also Annex 1, Table 12).

ANNEX 1

STATISTICAL DATA

TABLE 1 - WORLD SEABORNE TRADE AND CARGO FLEET

| | OIL AND OIL PRODUCTS | | | | OTHER CARGO | | | | TOTAL | | | |
|------|--------------------------|--------------------|-------------|--------------------|--------------------------|--------------------|-------------|--------------------|--------------------------|--------------------|-------------|--------------------|
| | Seaborne trade | | fleet * | | Seaborne trade | | fleet * | | Seaborne trade | | fleet * | |
| | '000 million tonne-miles | reference 1973-100 | million tpi | reference 1973-100 | '000 million tonne-miles | reference 1973-100 | million tpi | reference 1973-100 | '000 million tonne-miles | reference 1973-100 | million tpi | reference 1973-100 |
| 1973 | 10.217 | 100 | 234,3 | 100 | 5.187 | 100 | 205,6 | 100 | 15.404 | 100 | 439,9 | 100 |
| 1974 | 10.621 | 104 | 275,4 | 118 | 5.766 | 111 | 218,6 | 106 | 16.387 | 106 | 493,9 | 112 |
| 1975 | 9.730 | 95 | 313,0 | 134 | 5.636 | 109 | 230,7 | 112 | 15.366 | 100 | 543,7 | 124 |
| 1976 | 11.149 | 109 | 343,9 | 147 | 5.874 | 113 | 247,4 | 120 | 17.023 | 111 | 591,3 | 134 |
| 1977 | 11.403 | 112 | 358,1 | 152 | 6.050 | 117 | 268,6 | 131 | 17.453 | 113 | 624,6 | 142 |
| 1978 | 10.546 | 103 | 353,0 | 151 | 6.388 | 123 | 279,8 | 136 | 16.934 | 110 | 632,7 | 144 |
| 1979 | 10.497 | 103 | 350,9 | 150 | 7.016 | 135 | 287,0 | 140 | 17.513 | 114 | 637,9 | 145 |
| 1980 | 9.239 | 90 | 348,4 | 149 | 7.372 | 142 | 293,0 | 143 | 16.611 | 108 | 641,3 | 146 |
| 1981 | 8.193 | 80 | 342,9 | 146 | 7.469 | 144 | 305,9 | 149 | 15.662 | 102 | 648,7 | 147 |
| 1982 | 6.282 | 62 | 322,5 | 138 | 7.217 | 139 | 320,6 | 155 | 13.499 | 88 | 643,0 | 146 |
| 1983 | 5.558 | 54 | 301,4 | 129 | 7.022 | 135 | 331,0 | 156 | 12.580 | 82 | 632,4 | 144 |
| 1984 | 5.648 | 55 | 285,1 | 122 | 7.778 | 150 | 341,2 | 166 | 13.426 | 87 | 626,2 | 142 |
| 1985 | 5.157 | 50 | 257,1 | 110 | 7.908 | 152 | 348,2 | 169 | 13.065 | 85 | 605,3 | 138 |
| 1986 | 5.905 | 58 | 249,7 | 107 | 7.951 | 153 | 345,5 | 168 | 13.856 | 90 | 595,2 | 135 |
| 1987 | 6.016 | 59 | 245,8 | 105 | 8.282 | 160 | 342,2 | 166 | 14.298 | 93 | 588,0 | 134 |
| 1988 | 6.510 | 64 | 248,8 | 106 | 8.795 | 170 | 345,0 | 168 | 15.305 | 99 | 593,8 | 135 |
| 1989 | 7.276 | 71 | 255,6 | 109 | 9.126 | 176 | 353,7 | 172 | 16.402 | 106 | 609,2 | 138 |
| est. | | | | | | | | | | | | |
| 1990 | 7.220 | 76 | 261,6 | 112 | 9.315 | 180 | 364,1 | 177 | 17.035 | 111 | 625,6 | 142 |

* = as at end of the year

est. = provisional

Source = Fearnleys Oslo

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TABLE 2 - TONNAGE WITHDRAWN (in '000 grt/dwt)

| TONNAGE LAID UP | | | | | TONNAGE BROKEN UP | | | | TONNAGE USED FOR STORAGE | | | |
|-----------------|-------|-------|--------|--------|-------------------|-------|--------|--------|--------------------------|-------|-----|--------|
| | month | n° | grt | dwt | | n° | grt | dwt | | month | n° | dwt |
| 1976 | VII | 785 | 29.851 | 55.289 | | | | | | | | |
| | X | 737 | 25.486 | 47.507 | 1976 | 1.086 | 12.840 | 21.703 | | | | |
| 1979 | I | 595 | 16.678 | 30.290 | | | | | 1979 | I | 40 | 7.856 |
| | VII | 417 | 11.206 | 20.063 | 1979 | 904 | 6.987 | 11.137 | | VII | 37 | 6.668 |
| | X | 353 | 7.490 | 12.518 | | | | | | X | 37 | 6.672 |
| 1980 | I | 298 | 6.204 | 10.803 | 1980 | 887 | 9.184 | 15.940 | 1980 | I | 39 | 7.112 |
| | VII | 288 | 6.767 | 12.249 | | | | | | VII | 45 | 9.199 |
| | X | 233 | 5.371 | 9.512 | | | | | | X | 67 | 14.266 |
| 1981 | I | 229 | 4.840 | 8.288 | 1981 | 824 | 9.789 | 17.517 | 1981 | I | 74 | 16.866 |
| | VII | 246 | 8.618 | 15.562 | | | | | | VII | 77 | 15.668 |
| | X | 287 | 10.399 | 19.014 | | | | | | X | 149 | 35.950 |
| 1982 | I | 353 | 14.111 | 26.391 | 1982 | 1.081 | 18.086 | 32.160 | 1982 | I | 120 | 28.757 |
| | VII | 624 | 25.437 | 49.122 | | | | | | VII | 79 | 18.295 |
| | X | 1.071 | 35.293 | 67.260 | | | | | | X | 64 | 13.860 |
| 1983 | I | 1.292 | 40.657 | 77.168 | 1983 | 1.323 | 20.299 | 36.881 | 1983 | I | 58 | 11.812 |
| | VII | 1.403 | 45.093 | 85.755 | | | | | | VII | 70 | 13.482 |
| | X | 1.429 | 42.641 | 80.959 | | | | | | X | 78 | 14.868 |
| 1984 | I | 1.383 | 40.805 | 77.274 | 1984 | 1.500 | 19.661 | 34.757 | 1984 | I | 73 | 13.450 |
| | VII | 1.202 | 35.629 | 66.841 | | | | | | VII | 95 | 19.672 |
| | X | 1.147 | 33.049 | 61.693 | | | | | | X | 98 | 21.164 |
| 1985 | I | 1.015 | 31.048 | 58.194 | 1985 | 1.722 | 26.345 | 47.801 | 1985 | I | 86 | 17.847 |
| | VII | 926 | 28.750 | 54.510 | | | | | | VII | 87 | 18.101 |
| | X | 963 | 30.083 | 57.086 | | | | | | X | 91 | 18.223 |
| 1986 | I | 840 | 24.219 | 45.262 | 1986 | 1.576 | 20.860 | 36.164 | 1986 | I | 78 | 14.169 |
| | VII | 741 | 16.639 | 30.325 | | | | | | VII | 86 | 16.916 |
| | X | 698 | 13.781 | 24.283 | | | | | | X | 92 | 18.807 |
| 1987 | I | 606 | 12.073 | 21.368 | 1987 | 1.094 | 12.936 | 22.005 | 1987 | I | 96 | 20.142 |
| | VII | 484 | 9.923 | 17.248 | | | | | | VII | 75 | 16.499 |
| | X | 423 | 8.991 | 15.491 | | | | | | X | 63 | 13.306 |
| 1988 | I | 379 | 8.216 | 14.145 | 1988 | 812 | 6.124 | 9.908 | 1988 | I | 62 | 12.607 |
| | VII | 313 | 6.818 | 11.771 | | | | | | VI | 63 | 11.901 |
| | X | 272 | 4.835 | 7.595 | | | | | | X | 65 | 12.803 |
| 1989 | I | 286 | 4.213 | 6.519 | 1989 | 512 | 4.026 | 6.588 | 1989 | I | 68 | 13.540 |
| | VII | 198 | 2.862 | 4.278 | | | | | | VII | 53 | 9.361 |
| | X | 191 | 3.057 | 4.809 | | | | | | X | 55 | 11.093 |
| 1990 | I | 192 | 2.800 | 3.982 | 1990 | 479 | 3.255 | 5.305 | 1990 | I | 46 | 8.505 |
| | VII | 172 | 2.513 | 3.863 | | | | | | VII | 64 | 13.285 |
| | X | 168 | 2.401 | 3.852 | | | | | | X | 57 | 11.523 |
| 1991 | I | 164 | 2.576 | 4.352 | | | | | 1991 | I | 71 | 14.503 |

SOURCES : Institute of Shipping Economics - Bremen, Howard Moulder Chartering Ltd.

TABLE 3 - WORLD AND COMMUNITY FLEETS

| A. Fleet as at 1 July (in million grt/gt from 1984) | | | | | | | | | | | | | | | | |
|---|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| | 1980 | 1970 | 1975 | 1977 | 1979 | 1980 | 1981 | 1982 | 1983 | 1984 | 1985 | 1986 | 1987 | 1988 | 1989 | 1990 |
| WORLD | 129,8 | 227,5 | 342,2 | 383,7 | 413,0 | 419,9 | 420,8 | 424,7 | 422,6 | 418,7 | 416,3 | 404,9 | 403,5 | 403,4 | 410,5 | 423,6 |
| EEC | 50,5 | : | 103,4 | 114,4 | 119,9 | 120,6 | 119,4 | 114,0 | 104,8 | : | 88,2 | 77,4 | 66,8 | 62,4 | 59,9 | 59,1 |
| % EEC | 38,9 | : | 30,2 | 29,1 | 29,0 | 28,7 | 28,4 | 26,8 | 24,8 | : | 21,2 | 19,1 | 16,6 | 15,5 | 14,6 | 14,0 |

| B. Member States' fleets by flag (in '000 grt/gt from 1984) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|-----------------------------|---------|---------|--------|--------|--------|--------|--------|--------|--------|-----------|--------|--------|--------|--------|--------|--------|--------|-------|-------|---------|--------|--------|--------|--------|--------|-------|-------|-------|-------|
| | Existing fleet as at 1 July | | | | | | | | | | Broken up | | | | | | | | | | Laid up | | | | | | | | | |
| | 1981 | 1982 | 1983 | 1984 | 1985 | 1986 | 1987 | 1988 | 1989 | 1990 | 1981 | 1982 | 1983 | 1984 | 1985 | 1986 | 1987 | 1988 | 1989 | 1990 | 1981 | 1982 | 1983 | 1984 | 1985 | 1986 | 1987 | 1988 | 1989 | 1990 |
| | dec. | dec. | dec. | dec. | dec. | dec. | dec. | dec. | dec. | dec. | dec. | dec. | dec. | dec. | dec. | dec. | dec. | dec. | dec. | dec. | dec. | dec. | dec. | dec. | dec. | dec. | dec. | dec. | dec. | dec. |
| Germany | 7.708 | 7.707 | 6.897 | 6.242 | 6.177 | 5.565 | 4.318 | 3.917 | 3.967 | 4.301 | 143 | 185 | 250 | 176 | 318 | - | 26 | - | - | 12 | 17 | 409 | 501 | 318 | 208 | - | - | 84 | 87 | 58 |
| Belgium | 1.917 | 2.271 | 2.274 | 2.407 | 2.400 | 2.420 | 2.268 | 2.118 | 2.044 | 1.995 | - | - | 58 | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Denmark | 5.048 | 5.214 | 5.115 | 5.211 | 4.942 | 4.851 | 4.873 | 4.502 | 4.963 | 5.188 | 110 | 144 | - | - | 287 | - | - | - | 20 | 144 | 793 | 843 | 993 | 503 | - | - | - | - | - | |
| France | 11.455 | 10.771 | 9.888 | 8.945 | 8.237 | 5.936 | 5.371 | 4.506 | 4.413 | 3.832 | 397 | 479 | 658 | 464 | 1.451 | 73 | - | - | 22 | 297 | 519 | 1.343 | 1.536 | 723 | 499 | 272 | 194 | 53 | - | |
| Greece | 42.005 | 40.035 | 37.478 | 35.059 | 31.032 | 28.391 | 23.580 | 21.979 | 21.324 | 20.522 | 1.691 | 3.027 | 2.931 | 4.081 | 3.326 | 2.877 | 929 | 581 | 55 | 83 | 2.308 | 10.248 | 9.937 | 5.902 | 3.731 | 1.646 | 1.402 | 404 | 132 | 148 |
| Ireland | 268 | 239 | 223 | 221 | 194 | 149 | 154 | 173 | 167 | 181 | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Italy | 10.641 | 10.375 | 10.015 | 9.158 | 8.843 | 7.897 | 7.817 | 7.794 | 7.009 | 7.961 | 210 | 259 | 705 | 348 | 1.019 | 397 | 425 | 205 | 41 | 10 | 206 | 1.610 | 1.635 | 1.136 | 673 | 402 | 194 | - | 63 | 52 |
| Netherlands | 5.468 | 5.383 | 4.940 | 4.588 | 4.301 | 4.324 | 3.908 | 3.726 | 3.655 | 3.785 | 65 | 548 | 391 | 421 | 479 | - | - | - | - | 2 | - | - | 462 | 290 | - | 148 | - | - | - | - |
| UK | 25.419 | 22.505 | 19.122 | 15.874 | 14.344 | 11.567 | 8.505 | 8.280 | 7.646 | 6.716 | 1.026 | 1.107 | 932 | 501 | 387 | 181 | 138 | 156 | 1 | - | 770 | 1.591 | 2.272 | 2.084 | 1.327 | 190 | 156 | - | - | 64 |
| Luxembourg | - | - | - | - | - | - | - | 2 | 4 | 3 | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Spain | 8.134 | 8.131 | 7.505 | : | 6.256 | 5.422 | 4.949 | 4.415 | 3.962 | 3.807 | 21 | 215 | 263 | 181 | 302 | 203 | 37 | 159 | 182 | - | 206 | 696 | 616 | - | - | - | 63 | 51 | - | - |
| Portugal | 1.377 | 1.402 | 1.358 | : | 1.437 | 1.114 | 1.048 | 989 | 726 | 854 | 11 | 2 | 55 | - | 56 | 19 | - | - | 9 | 2 | - | - | - | 365 | 223 | - | - | 48 | - | - |
| TOTAL EEC | 119.440 | 114.043 | 104.795 | : | 88.163 | 77.436 | 66.771 | 62.381 | 59.880 | 59.135 | 3.674 | 5.966 | 6.246 | 6.152 | 7.625 | 3.750 | 1.554 | 1.111 | 303 | 133 | 3.948 | 16.866 | 17.609 | 12.624 | 7.388 | 2.885 | 2.087 | 781 | 335 | 323 |
| TOTAL WORLD | | | | | | | | | | | 9.754 | 18.088 | 20.299 | 19.658 | 26.345 | 20.860 | 12.936 | 16.124 | 4.026 | 3.255 | 11.348 | 38.815 | 40.924 | 31.676 | 25.878 | 12.213 | 8.495 | 4.485 | 2.604 | 2.388 |

Sources : existing fleet: Lloyd's Register of Shipping
 Other data : Institute of Shipping Economics, Bremen (Chiffres annuels ou à défaut, mensuels)
 : Unavailable .

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TABLE 4 - CONTRACT PRICES FOR ORDERS OF NEW VESSELS 1976-1986

(price at the end of the year in USD million as charged by the Japanese and Korean yards)

| | 1979 | 1980 | 1981 | 1982 | 1983 | 1984 | 1985 | 1986 | 1987 | 1988 | 1989 | 1990 |
|----------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| 30.000 tpl navire citerne | 23,0 | 26,0 | 25,0 | 17,0 | 16,0 | 14,5 | 13,0 | 14,0 | 20,0 | 27,0 | 31,0 | 30,0 |
| 80.000 tpl navire citerne | 29,0 | 34,5 | 38,0 | 24,0 | 23,0 | 21,0 | 18,5 | 21,0 | 29,0 | 38,0 | 43,0 | 44,0 |
| 130.000 tpl navire citerne | 37,5 | 45,0 | 51,0 | 32,5 | 31,5 | 29,0 | 25,0 | 26,5 | 34,0 | 46,0 | 54,0 | 55,0 |
| 250.000 tpl navire citerne | 48,0 | 63,0 | 72,5 | 50,5 | 48,5 | 44,0 | 37,0 | 42,5 | 54,0 | 73,0 | 82,0 | 86,0 |
| 400.000 tpl navire citerne | 60,0 | 85,0 | 90,0 | 61,0 | 57,0 | 51,0 | 44,0 | 50,5 | 60,0 | 88,0 | 101,0 | 120,0 |
| 96.000 tpl obo | 35,0 | 47,0 | 44,0 | 30,0 | 28,0 | 26,0 | 22,5 | 25,5 | 32,0 | 44,0 | 54,0 | 62,0 |
| 60.000 tpl vracquier | ? | 28,5 | 27,5 | 18,0 | 17,0 | 15,5 | 14,0 | 15,0 | 20,5 | 27,0 | 31,0 | 31,5 |
| 120.000 tpl vracquier | 33,0 | 44,0 | 42,0 | 26,0 | 25,0 | 24,0 | 20,5 | 23,0 | 30,0 | 39,0 | 44,0 | 46,0 |
| 125.000 m3 porteur GNL | 125,0 | 150,0 | 175,0 | 150,0 | 150,0 | 130,0 | 130,0 | 120,0 | 145,0 | 175,0 | 220,0 | 260,0 |
| 75.000 m3 porteur GPL | 60,0 | 75,0 | 75,0 | 53,0 | 50,0 | 45,0 | 42,5 | 47,5 | 55,0 | 61,0 | 71,0 | 80,0 |
| 5.000 tpl ro-ro | 14,0 | 16,0 | 20,0 | 15,0 | 12,0 | 10,0 | 9,0 | 10,0 | 13,0 | 16,0 | 19,0 | 21,0 |

Source : Fearnleys Oslo

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TABLE 5 A - PRODUCTION (COMPLETIONS)

1 000 CGT

| | | FIGURES AT THE END OF THE YEAR | | | | | | | | | | | |
|---------------|----------------|--------------------------------|---------|---------|---------|---------|---------|---------|---------|--------|--------|--------|---------|
| | | 1976 | 1980 | 1981 | 1982 | 1983 | 1984 | 1985 | 1986 | 1987 | 1988 | 1989 | 1990 |
| E.E.C. | F.R.GERMANY | 1468.0 | 596.2 | 870.2 | 757.3 | 811.3 | 662.2 | 641.2 | 578.7 | 396.4 | 502.5 | 452.9 | 656.7 |
| | BELGIUM | 139.8 | 129.6 | 95.5 | 83.0 | 173.2 | 102.3 | 124.4 | 45.0 | 25.9 | 46.8 | 35.5 | 71.7 |
| | DENMARK | 560.6 | 382.4 | 343.8 | 329.2 | 338.5 | 355.4 | 444.0 | 350.7 | 194.4 | 277.2 | 287.0 | 305.5 |
| | FRANCE | 672.4 | 267.8 | 443.3 | 353.3 | 356.8 | 357.2 | 164.1 | 145.0 | 207.9 | 63.2 | 198.8 | 114.0 |
| | GREECE | | 12.8 | 5.2 | 61.8 | 35.7 | 39.8 | 43.8 | 24.7 | 6.6 | 12.3 | 12.5 | 45.5 |
| | IRELAND | 20.3 | 3.0 | 17.0 | 0.0 | 19.2 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| | ITALY | 353.9 | 345.5 | 359.2 | 156.2 | 217.0 | 182.3 | 123.8 | 60.9 | 224.8 | 119.9 | 284.5 | 327.6 |
| | NETHERLANDS | 940.0 | 249.5 | 341.6 | 390.0 | 415.8 | 259.3 | 310.2 | 262.8 | 146.2 | 153.1 | 171.9 | 263.5 |
| | UNITED KINGDOM | 985.1 | 458.8 | 243.2 | 394.0 | 319.3 | 305.3 | 164.4 | 141.5 | 162.3 | 113.2 | 157.3 | 144.6 |
| | SPAIN | 734.0 | 441.4 | 556.8 | 587.4 | 488.7 | 345.9 | 400.3 | 229.8 | 328.4 | 326.4 | 306.0 | 364.8 |
| | PORTUGAL | 53.0 | 35.3 | 6.4 | 31.2 | 124.7 | 18.5 | 40.3 | 61.0 | 26.3 | 23.0 | 46.3 | 64.6 |
| | TOTAL | 5927.1 | 2922.1 | 3282.2 | 3143.4 | 3300.2 | 2628.2 | 2456.5 | 1900.1 | 1719.2 | 1637.6 | 1952.7 | 2358.5 |
| EX - R.D.A | | | | 400.1 | 424.2 | 456.5 | 502.5 | 502.0 | 488.3 | 368.3 | 382.5 | 393.6 | 344.9 |
| OTHER | FINLAND | | 371.9 | 407.5 | 440.6 | 503.3 | 419.1 | 282.9 | 260.4 | 145.3 | 262.7 | 321.2 | 379.0 |
| A.W.E.S. | NORWAY | | 323.7 | 342.1 | 447.8 | 278.3 | 175.9 | 222.1 | 162.8 | 181.3 | 155.2 | 79.4 | 157.9 |
| | SWEDEN | | 334.5 | 421.0 | 253.2 | 293.8 | 179.8 | 127.4 | 115.5 | 123.0 | 72.1 | 34.4 | 45.1 |
| | TOTAL A.W.E.S. | 8285.8 | 4028.8 | 4852.9 | 4709.2 | 4832.1 | 3905.5 | 3590.9 | 2927.1 | 2537.1 | 2510.1 | 2781.3 | 3285.4 |
| JAPAN | | 8348.8 | 5207.2 | 5580.9 | 5811.1 | 4908.2 | 6951.1 | 6498.4 | 5085.4 | 3795.3 | 2952.7 | 3664.1 | 4456.0 |
| SOUTH KOREA | | 349.4 | 445.7 | 512.2 | 880.3 | 985.5 | 1014.9 | 1633.3 | 1971.4 | 1193.5 | 1504.7 | 1389.2 | 1564.2 |
| CHINA | | | | 27.9 | 104.5 | 170.4 | 297.8 | 172.4 | 214.6 | 207.3 | 253.1 | 230.0 | 303.5 |
| POLAND | | | 497.7 | 346.4 | 369.5 | 277.1 | 382.4 | 357.5 | 340.0 | 300.0 | 344.0 | 237.9 | 176.6 |
| USSR | | | 424.8 | 599.9 | 504.2 | 475.3 | 689.5 | 274.2 | 170.4 | 44.3 | 56.0 | 226.7 | 481.9 |
| YUGOSLAVIA | | | 170.6 | 224.8 | 220.5 | 217.0 | 237.2 | 281.4 | 188.4 | 3.0 | 230.5 | 327.7 | 293.4 |
| REST OF WORLD | | 5094.2 | 1860.4 | 1696.0 | 1988.5 | 1686.7 | 1519.7 | 1360.5 | 1241.8 | 1164.5 | 747.3 | 1024.2 | 1095.3 |
| TOTAL WORLD | | 22078.2 | 12635.2 | 13841.0 | 14587.8 | 13552.3 | 14998.1 | 14168.6 | 12139.1 | 9245.0 | 8598.4 | 9881.1 | 11656.3 |

Source: Commission/LMIS contract

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TABLE 5 B - PRODUCTION (COMPLETIONS)

MARKET SHARES

| | | FIGURES AT THE END OF THE YEAR | | | | | | | | | | | |
|----------------|----------------|--------------------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| | | 1976 | 1980 | 1981 | 1982 | 1983 | 1984 | 1985 | 1986 | 1987 | 1988 | 1989 | 1990 |
| E.E.C. | F.R.GERMANY | 6.6% | 4.7% | 6.3% | 5.2% | 6.0% | 4.4% | 4.5% | 4.8% | 4.3% | 5.8% | 4.6% | 5.6% |
| | BELGIUM | 0.6% | 1.0% | 0.7% | 0.6% | 1.3% | 0.7% | 0.9% | 0.4% | 0.3% | 0.5% | 0.4% | 0.6% |
| | DENMARK | 2.5% | 3.0% | 2.5% | 2.3% | 2.5% | 2.4% | 3.1% | 2.9% | 2.1% | 3.2% | 2.9% | 2.6% |
| | FRANCE | 3.0% | 2.1% | 3.2% | 2.4% | 2.6% | 2.4% | 1.2% | 1.2% | 2.2% | 0.7% | 2.0% | 1.0% |
| | GREECE | | 0.1% | 0.0% | 0.4% | 0.3% | 0.3% | 0.3% | 0.2% | 0.1% | 0.1% | 0.1% | 0.4% |
| | IRELAND | 0.1% | 0.0% | 0.1% | 0.0% | 0.1% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| | ITALY | 1.6% | 2.7% | 2.6% | 1.1% | 1.6% | 1.2% | 0.9% | 0.5% | 2.4% | 1.4% | 2.9% | 2.8% |
| | NETHERLANDS | 4.3% | 2.0% | 2.5% | 2.7% | 3.1% | 1.7% | 2.2% | 2.2% | 1.6% | 1.8% | 1.7% | 2.3% |
| | UNITED KINGDOM | 4.5% | 3.6% | 1.8% | 2.7% | 2.4% | 2.0% | 1.2% | 1.2% | 1.8% | 1.3% | 1.6% | 1.2% |
| | SPAIN | 3.3% | 3.5% | 4.0% | 4.0% | 3.6% | 2.3% | 2.8% | 1.9% | 3.6% | 3.8% | 3.1% | 3.1% |
| | PORTUGAL | 0.2% | 0.3% | 0.0% | 0.2% | 0.9% | 0.1% | 0.3% | 0.5% | 0.3% | 0.3% | 0.5% | 0.6% |
| TOTAL | | 26.8% | 23.1% | 23.7% | 21.5% | 24.4% | 17.5% | 17.3% | 15.7% | 18.6% | 19.0% | 19.8% | 20.2% |
| EX - R.D.A. | | | | 2.9% | 2.9% | 3.4% | 3.4% | 3.5% | 4.0% | 4.0% | 4.4% | 4.0% | 3.0% |
| OTHER | FINLAND | | 2.9% | 2.9% | 3.0% | 3.7% | 2.8% | 2.0% | 2.1% | 1.6% | 3.1% | 3.3% | 3.3% |
| A.W.E.S. | NORWAY | | 2.6% | 2.5% | 3.1% | 2.1% | 1.2% | 1.6% | 1.3% | 2.0% | 1.8% | 0.8% | 1.4% |
| | SWEDEN | | 2.6% | 3.0% | 1.7% | 2.2% | 1.2% | 0.9% | 1.0% | 1.3% | 0.8% | 0.3% | 0.4% |
| TOTAL A.W.E.S. | | 37.5% | 31.9% | 35.1% | 32.3% | 35.7% | 26.0% | 25.3% | 24.1% | 27.4% | 29.2% | 28.1% | 28.2% |
| JAPAN | | 37.8% | 41.2% | 40.3% | 39.8% | 36.2% | 46.3% | 45.9% | 41.9% | 41.1% | 34.3% | 37.1% | 38.2% |
| SOUTH KOREA | | 1.6% | 3.5% | 3.7% | 6.0% | 7.3% | 6.8% | 11.5% | 16.2% | 12.9% | 17.5% | 14.1% | 13.4% |
| CHINA | | | | 0.2% | 0.7% | 1.3% | 2.0% | 1.2% | 1.8% | 2.2% | 2.9% | 2.3% | 2.6% |
| POLAND | | | 3.9% | 2.5% | 2.5% | 2.0% | 2.5% | 2.5% | 2.8% | 3.2% | 4.0% | 2.4% | 1.5% |
| USSR | | | 3.4% | 4.3% | 3.5% | 3.5% | 4.6% | 1.9% | 1.4% | 0.5% | 0.7% | 2.3% | 4.1% |
| YUGOSLAVIA | | | 1.4% | 1.6% | 1.5% | 1.6% | 1.6% | 2.0% | 1.6% | 0.0% | 2.7% | 3.3% | 2.5% |
| REST OF WORLD | | 23.1% | 14.7% | 12.3% | 13.6% | 12.4% | 10.1% | 9.6% | 10.2% | 12.6% | 8.7% | 10.4% | 9.4% |
| TOTAL WORLD | | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: Commission/LMIS contract

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TABLE 5 C - 1990 PRODUCTION BY TYPE OF SHIP

| | | 1000 CGT | | | | | | | | | | | | | | | |
|----------------|----------------|------------|-------------------------|--------------|---------------|--------------------|--------|---------------|--------------|-------------|-------------|-------------|-------|---------------|---------|-------------------------|---------|
| | | OIL TANKER | PROD. & CHEMIC. CARRIER | BULK CARRIER | COMB. CARRIER | GENERAL CARGO SHIP | REEFER | FULL CONTAIN. | RO-RO VESSEL | CAR CARRIER | LPG CARRIER | LNG CARRIER | FERRY | PASSENG. SHIP | FISHING | OTHER NON CARGO VESSELS | TOTAL |
| E.E.C. | F.R.GERMANY | 0.0 | 0.0 | 0.0 | 0.0 | 138.5 | 13.6 | 257.7 | 22.8 | 0.0 | 38.5 | 0.0 | 53.9 | 70.2 | 12.0 | 49.6 | 656.8 |
| | BELGIUM | 0.0 | 0.0 | 0.0 | 0.0 | 0.7 | 0.0 | 0.0 | 0.0 | 0.0 | 37.4 | 0.0 | 0.0 | 0.0 | 1.5 | 32.2 | 71.8 |
| | DENMARK | 0.0 | 106.9 | 0.0 | 0.0 | 5.3 | 32.0 | 123.2 | 12.4 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 8.4 | 17.4 | 305.6 |
| | FRANCE | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 72.8 | 26.3 | 14.8 | 113.9 |
| | GREECE | 0.0 | 7.4 | 0.0 | 0.0 | 6.8 | 17.6 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 9.1 | 0.0 | 4.6 | 0.0 | 45.5 |
| | IRELAND | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| | ITALY | 0.0 | 30.6 | 68.2 | 0.0 | 0.0 | 27.3 | 19.0 | 0.0 | 0.0 | 14.4 | 0.0 | 15.4 | 136.6 | 10.4 | 5.8 | 327.7 |
| | NETHERLANDS | 0.0 | 6.5 | 0.0 | 0.0 | 111.7 | 24.3 | 7.9 | 6.6 | 0.0 | 10.8 | 0.0 | 5.8 | 0.0 | 23.0 | 66.9 | 263.5 |
| | UNITED KINGDOM | 0.0 | 36.9 | 0.0 | 0.0 | 15.2 | 0.0 | 27.0 | 0.0 | 0.0 | 0.0 | 0.0 | 44.3 | 0.0 | 5.6 | 15.7 | 144.7 |
| | SPAIN | 86.2 | 11.4 | 0.0 | 0.0 | 28.8 | 91.2 | 0.0 | 0.0 | 0.0 | 8.2 | 0.0 | 0.0 | 30.5 | 107.9 | 0.5 | 364.7 |
| | PORTUGAL | 21.0 | 0.0 | 0.0 | 0.0 | 33.7 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 9.8 | 0.0 | 64.5 |
| TOTAL | | 107.2 | 199.7 | 68.2 | 0.0 | 340.7 | 206.0 | 434.8 | 41.8 | 0.0 | 109.3 | 0.0 | 128.5 | 310.1 | 209.5 | 202.9 | 2358.7 |
| EX - R.D.A | | 0.0 | 0.0 | 0.0 | 0.0 | 122.1 | 0.0 | 32.4 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 155.3 | 35.2 | 345.0 |
| OTHER | FINLAND | 0.0 | 34.1 | 0.0 | 0.0 | 0.0 | 13.5 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 36.0 | 215.8 | 0.0 | 79.5 | 378.9 |
| A.W.E.S. | NORWAY | 0.0 | 26.5 | 0.0 | 0.0 | 10.5 | 15.0 | 0.0 | 4.3 | 0.0 | 0.0 | 0.0 | 23.3 | 1.4 | 48.1 | 28.9 | 158.0 |
| | SWEDEN | 0.0 | 9.2 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 19.6 | 0.0 | 0.0 | 0.0 | 8.4 | 2.4 | 5.5 | 0.0 | 45.1 |
| TOTAL A.W.E.S. | | 107.2 | 269.5 | 68.2 | 0.0 | 473.3 | 234.5 | 467.2 | 65.7 | 0.0 | 109.3 | 0.0 | 196.2 | 529.7 | 418.4 | 346.5 | 3285.7 |
| JAPAN | | 707.1 | 448.9 | 1148.2 | 0.0 | 347.6 | 214.0 | 399.0 | 32.2 | 97.0 | 303.2 | 128.6 | 182.6 | 186.9 | 198.8 | 61.8 | 4455.9 |
| SOUTH KOREA | | 236.7 | 85.2 | 795.3 | 0.0 | 50.5 | 0.0 | 298.0 | 17.0 | 0.0 | 31.9 | 0.0 | 3.7 | 0.0 | 38.5 | 7.5 | 1564.3 |
| CHINA | | 0.0 | 34.4 | 120.0 | 0.0 | 52.7 | 28.9 | 30.8 | 10.5 | 0.0 | 0.0 | 0.0 | 5.6 | 0.0 | 13.8 | 6.6 | 303.3 |
| POLAND | | 0.0 | 0.0 | 9.4 | 0.0 | 27.2 | 14.4 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 15.1 | 0.0 | 35.9 | 74.5 | 176.5 |
| USSR | | 0.0 | 105.8 | 31.6 | 0.0 | 75.6 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 4.0 | 0.0 | 216.1 | 48.8 | 481.9 |
| YUGOSLAVIA | | 54.4 | 149.7 | 33.8 | 0.0 | 14.6 | 23.5 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 7.7 | 9.8 | 293.5 |
| REST OF WORLD | | 57.7 | 239.3 | 329.6 | 0.0 | 177.3 | 0.0 | 38.7 | 1.7 | 0.0 | 0.0 | 0.0 | 26.1 | 0.0 | 97.6 | 127.3 | 1095.3 |
| TOTAL WORLD | | 1163.1 | 1332.8 | 2536.1 | 0.0 | 1218.8 | 515.3 | 1233.7 | 127.1 | 97.0 | 444.4 | 128.6 | 433.3 | 716.6 | 1026.8 | 682.8 | 11656.4 |

Source: Commission/LMIS contract

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TABLE 5 D -1990 PRODUCTION BY TYPE OF SHIP

| | | MARKET SHARES | | | | | | | | | | | | | | | |
|----------------|----------------|---------------|-------------------------|--------------|---------------|--------------------|--------|---------------|--------------|-------------|-------------|-------------|-------|---------------|---------|-------------------------|--------|
| | | OIL TANKER | PROD. & CHEMIC. CARRIER | BULK CARRIER | COMB. CARRIER | GENERAL CARGO SHIP | REEFER | FULL CONTAIN. | RO-RO VESSEL | CAR CARRIER | LPG CARRIER | LNG CARRIER | FERRY | PASSENG. SHIP | FISHING | OTHER NON CARGO VESSELS | TOTAL |
| E.E.C. | F.R.GERMANY | 0.0% | 0.0% | 0.0% | 0.0% | 21.1% | 2.1% | 39.2% | 3.5% | 0.0% | 5.9% | 0.0% | 8.2% | 10.7% | 1.8% | 7.6% | 100.0% |
| | BELGIUM | 0.0% | 0.0% | 0.0% | 0.0% | 1.0% | 0.0% | 0.0% | 0.0% | 0.0% | 52.1% | 0.0% | 0.0% | 0.0% | 2.1% | 44.8% | 100.0% |
| | DENMARK | 0.0% | 35.0% | 0.0% | 0.0% | 1.7% | 10.5% | 40.3% | 4.1% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 2.7% | 5.7% | 100.0% |
| | FRANCE | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 63.9% | 23.1% | 13.0% | 100.0% |
| | GREECE | 0.0% | 16.3% | 0.0% | 0.0% | 14.9% | 38.7% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 20.0% | 0.0% | 10.1% | 0.0% | 100.0% |
| | IRELAND | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| | ITALY | 0.0% | 9.3% | 20.8% | 0.0% | 0.0% | 8.3% | 5.8% | 0.0% | 0.0% | 4.4% | 0.0% | 4.7% | 41.7% | 3.2% | 1.8% | 100.0% |
| | NETHERLANDS | 0.0% | 2.5% | 0.0% | 0.0% | 42.4% | 9.2% | 3.0% | 2.5% | 0.0% | 4.1% | 0.0% | 2.2% | 0.0% | 8.7% | 25.4% | 100.0% |
| | UNITED KINGDOM | 0.0% | 25.5% | 0.0% | 0.0% | 10.5% | 0.0% | 18.7% | 0.0% | 0.0% | 0.0% | 0.0% | 30.6% | 0.0% | 3.9% | 10.8% | 100.0% |
| | SPAIN | 23.6% | 3.1% | 0.0% | 0.0% | 7.9% | 25.0% | 0.0% | 0.0% | 0.0% | 2.2% | 0.0% | 0.0% | 8.4% | 29.6% | 0.1% | 100.0% |
| | PORTUGAL | 32.6% | 0.0% | 0.0% | 0.0% | 52.2% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 15.2% | 0.0% | 100.0% |
| TOTAL | | 4.5% | 8.5% | 2.9% | 0.0% | 14.4% | 8.7% | 18.4% | 1.8% | 0.0% | 4.6% | 0.0% | 5.4% | 13.1% | 8.9% | 8.6% | 100.0% |
| EX - R.D.A | | 0.0% | 0.0% | 0.0% | 0.0% | 35.4% | 0.0% | 9.4% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 45.0% | 10.2% | 100.0% |
| OTHER | FINLAND | 0.0% | 9.0% | 0.0% | 0.0% | 0.0% | 3.6% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 9.5% | 57.0% | 0.0% | 21.0% | 100.0% |
| A.W.E.S. | NORWAY | 0.0% | 16.8% | 0.0% | 0.0% | 6.6% | 9.5% | 0.0% | 2.7% | 0.0% | 0.0% | 0.0% | 14.7% | 0.9% | 30.4% | 18.3% | 100.0% |
| | SWEDEN | 0.0% | 20.4% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 43.5% | 0.0% | 0.0% | 0.0% | 18.6% | 5.3% | 12.2% | 0.0% | 100.0% |
| TOTAL A.W.E.S. | | 3.3% | 8.2% | 2.1% | 0.0% | 14.4% | 7.1% | 14.2% | 2.0% | 0.0% | 3.3% | 0.0% | 6.0% | 16.1% | 12.7% | 10.5% | 100.0% |
| JAPAN | | 15.9% | 10.1% | 25.8% | 0.0% | 7.8% | 4.8% | 9.0% | 0.7% | 2.2% | 6.8% | 2.9% | 4.1% | 4.2% | 4.5% | 1.4% | 100.0% |
| SOUTH KOREA | | 15.1% | 5.4% | 50.8% | 0.0% | 3.2% | 0.0% | 19.1% | 1.1% | 0.0% | 2.0% | 0.0% | 0.2% | 0.0% | 2.5% | 0.5% | 100.0% |
| CHINA | | 0.0% | 11.3% | 39.6% | 0.0% | 17.4% | 9.5% | 10.2% | 3.5% | 0.0% | 0.0% | 0.0% | 1.8% | 0.0% | 4.5% | 2.2% | 100.0% |
| POLAND | | 0.0% | 0.0% | 5.3% | 0.0% | 15.4% | 8.2% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 8.6% | 0.0% | 20.3% | 42.2% | 100.0% |
| USSR | | 0.0% | 22.0% | 6.6% | 0.0% | 15.7% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.8% | 0.0% | 44.8% | 10.1% | 100.0% |
| YUGOSLAVIA | | 18.5% | 51.0% | 11.5% | 0.0% | 5.0% | 8.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 2.6% | 3.3% | 100.0% |
| REST OF WORLD | | 5.3% | 21.8% | 30.1% | 0.0% | 16.2% | 0.0% | 3.5% | 0.2% | 0.0% | 0.0% | 0.0% | 2.4% | 0.0% | 8.9% | 11.6% | 100.0% |
| TOTAL WORLD | | 10.0% | 11.4% | 21.8% | 0.0% | 10.5% | 4.4% | 10.6% | 1.1% | 0.8% | 3.8% | 1.1% | 3.7% | 6.1% | 8.8% | 5.9% | 100.0% |

Source: Commission/LMIS contract

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TABLE 5 E -1990 PRODUCTION BY TYPE OF SHIP

| | | MARKET SHARES | | | | | | | | | | | | | | | |
|----------------|----------------|---------------|------------------------|--------------|---------------|--------------------|--------|---------------|--------------|-------------|-------------|-------------|--------|---------------|---------|-------------------------|--------|
| | | OIL TANKER | PROD. & CHEMIC CARRIER | BULK CARRIER | COMB. CARRIER | GENERAL CARGO SHIP | REEFER | FULL CONTAIN. | RO-RO VESSEL | CAR CARRIER | LPG CARRIER | LNG CARRIER | FERRY | PASSENG. SHIP | FISHING | OTHER NON CARGO VESSELS | TOTAL |
| E.E.C. | F.R.GERMANY | 0.0% | 0.0% | 0.0% | 0.0% | 11.4% | 2.6% | 20.9% | 17.9% | 0.0% | 8.7% | 0.0% | 12.4% | 9.8% | 1.2% | 7.3% | 5.6% |
| | BELGIUM | 0.0% | 0.0% | 0.0% | 0.0% | 0.1% | 0.0% | 0.0% | 0.0% | 0.0% | 8.4% | 0.0% | 0.0% | 0.0% | 0.1% | 4.7% | 0.6% |
| | DENMARK | 0.0% | 8.0% | 0.0% | 0.0% | 0.4% | 8.2% | 10.0% | 9.8% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.8% | 2.5% | 2.6% |
| | FRANCE | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 10.2% | 2.6% | 2.2% | 1.0% |
| | GREECE | 0.0% | 0.6% | 0.0% | 0.0% | 0.6% | 3.4% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 2.1% | 0.0% | 0.4% | 0.0% | 0.4% |
| | IRELAND | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| | ITALY | 0.0% | 2.3% | 2.7% | 0.0% | 0.0% | 5.3% | 1.5% | 0.0% | 0.0% | 3.2% | 0.0% | 3.6% | 19.1% | 1.0% | 0.8% | 2.8% |
| | NETHERLANDS | 0.0% | 0.5% | 0.0% | 0.0% | 9.2% | 4.7% | 0.6% | 5.2% | 0.0% | 2.4% | 0.0% | 1.3% | 0.0% | 2.2% | 9.8% | 2.3% |
| | UNITED KINGDOM | 0.0% | 2.8% | 0.0% | 0.0% | 1.2% | 0.0% | 2.2% | 0.0% | 0.0% | 0.0% | 0.0% | 10.2% | 0.0% | 0.5% | 2.3% | 1.2% |
| | SPAIN | 7.4% | 0.9% | 0.0% | 0.0% | 2.4% | 17.7% | 0.0% | 0.0% | 0.0% | 1.8% | 0.0% | 0.0% | 4.3% | 10.5% | 0.1% | 3.1% |
| | PORTUGAL | 1.8% | 0.0% | 0.0% | 0.0% | 2.8% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 1.0% | 0.0% | 0.6% |
| TOTAL | | 9.2% | 15.0% | 2.7% | 0.0% | 28.0% | 40.0% | 35.2% | 32.9% | 0.0% | 24.6% | 0.0% | 29.7% | 43.3% | 20.4% | 29.7% | 20.2% |
| EX - R.D.A | | 0.0% | 0.0% | 0.0% | 0.0% | 10.0% | 0.0% | 2.6% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 15.1% | 5.2% | 3.0% |
| OTHER | FINLAND | 0.0% | 2.6% | 0.0% | 0.0% | 0.0% | 2.6% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 8.3% | 30.1% | 0.0% | 11.6% | 3.3% |
| A.W.E.S. | NORWAY | 0.0% | 2.0% | 0.0% | 0.0% | 0.9% | 2.9% | 0.0% | 3.4% | 0.0% | 0.0% | 0.0% | 5.4% | 0.2% | 4.7% | 4.2% | 1.4% |
| | SWEDEN | 0.0% | 0.7% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 15.4% | 0.0% | 0.0% | 0.0% | 1.9% | 0.3% | 0.5% | 0.0% | 0.4% |
| TOTAL A.W.E.S. | | 9.2% | 20.2% | 2.7% | 0.0% | 38.8% | 45.5% | 37.9% | 51.7% | 0.0% | 24.6% | 0.0% | 45.3% | 73.9% | 40.7% | 50.7% | 28.2% |
| JAPAN | | 60.8% | 33.7% | 45.3% | 0.0% | 28.5% | 41.5% | 32.3% | 25.3% | 100.0% | 68.2% | 100.0% | 42.1% | 26.1% | 19.4% | 9.1% | 38.2% |
| SOUTH KOREA | | 20.4% | 6.4% | 31.4% | 0.0% | 4.1% | 0.0% | 24.2% | 13.4% | 0.0% | 7.2% | 0.0% | 0.9% | 0.0% | 3.7% | 1.1% | 13.4% |
| CHINA | | 0.0% | 2.6% | 4.7% | 0.0% | 4.3% | 5.6% | 2.5% | 8.3% | 0.0% | 0.0% | 0.0% | 1.3% | 0.0% | 1.3% | 1.0% | 2.6% |
| POLAND | | 0.0% | 0.0% | 0.4% | 0.0% | 2.2% | 2.8% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 3.5% | 0.0% | 3.5% | 10.9% | 1.5% |
| USSR | | 0.0% | 7.9% | 1.2% | 0.0% | 6.2% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.9% | 0.0% | 21.0% | 7.1% | 4.1% |
| YUGOSLAVIA | | 4.7% | 11.2% | 1.3% | 0.0% | 1.2% | 4.6% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.7% | 1.4% | 2.5% |
| REST OF WORLD | | 5.0% | 18.0% | 13.0% | 0.0% | 14.5% | 0.0% | 3.1% | 1.3% | 0.0% | 0.0% | 0.0% | 6.0% | 0.0% | 9.5% | 18.6% | 9.4% |
| TOTAL WORLD | | 100.0% | 100.0% | 100.0% | 0.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: Commission/LMIS contract

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TABLE 6 A - NEW ORDERS

1 000 CGT

| | | REVISED FIGURES AT THE END OF THE YEAR | | | | | | | | | | | |
|----------------|----------------|--|---------|---------|---------|---------|---------|---------|--------|--------|--------|---------|---------|
| | | 1976 | 1980 | 1981 | 1982 | 1983 | 1984 | 1985 | 1986 | 1987 | 1988 | 1989 | 1990 |
| E.E.C. | F.R.GERMANY | 726.1 | 613.0 | 871.2 | 716.7 | 550.4 | 644.5 | 819.7 | 328.8 | 533.8 | 652.8 | 934.9 | 486.5 |
| | BELGIUM | 75.0 | 53.8 | 81.4 | 43.3 | 58.7 | 69.5 | 26.8 | 43.2 | 34.0 | 52.0 | 101.7 | 71.4 |
| | DENMARK | 317.1 | 284.6 | 296.6 | 250.6 | 428.9 | 405.2 | 86.0 | 305.9 | 219.2 | 205.3 | 192.4 | 596.4 |
| | FRANCE | 63.6 | 556.4 | 333.0 | 175.9 | 136.4 | 106.5 | 262.5 | 132.4 | 60.5 | 204.6 | 165.9 | 136.2 |
| | GREECE | | 82.4 | 4.5 | 10.3 | 4.6 | 7.4 | 29.4 | 5.1 | 6.5 | 6.1 | 5.0 | 0.8 |
| | IRELAND | 19.2 | 1.3 | 18.2 | 1.3 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| | ITALY | 301.5 | 231.2 | 144.7 | 243.2 | 57.1 | 68.2 | 257.4 | 229.0 | 408.7 | 172.3 | 564.8 | 413.1 |
| | NETHERLANDS | 626.4 | 373.3 | 365.2 | 309.0 | 237.3 | 248.4 | 269.8 | 137.0 | 91.9 | 356.2 | 236.3 | 277.1 |
| | UNITED KINGDOM | 627.6 | 350.2 | 410.8 | 301.5 | 150.4 | 107.6 | 224.4 | 112.0 | 116.5 | 124.2 | 209.2 | 205.1 |
| | SPAIN | 297.0 | 737.5 | 675.2 | 323.9 | 222.1 | 92.2 | 197.6 | 258.5 | 421.7 | 453.8 | 274.1 | 487.8 |
| | PORTUGAL | 73.0 | 30.7 | 55.5 | 27.8 | 36.0 | 30.6 | 1.2 | 29.5 | 78.1 | 33.1 | 69.6 | 79.6 |
| TOTAL | | 3126.5 | 3314.4 | 3256.3 | 2403.5 | 1881.9 | 1780.1 | 2174.8 | 1581.4 | 1970.9 | 2260.4 | 2753.9 | 2754.0 |
| EX - R.D.A | | | | 378.7 | 523.2 | 686.5 | 428.4 | 408.5 | 968.3 | 338.6 | 224.8 | 465.7 | 389.1 |
| OTHER : | FINLAND | | 523.9 | 502.5 | 221.1 | 135.4 | 389.5 | 158.0 | 202.2 | 637.7 | 108.0 | 63.0 | 256.7 |
| A.W.E.S. | NORWAY | | 381.6 | 408.7 | 156.4 | 108.8 | 208.2 | 129.9 | 136.4 | 139.2 | 112.1 | 398.8 | 190.9 |
| | SWEDEN | | 205.4 | 359.3 | 184.5 | 278.4 | 34.0 | 16.1 | 59.2 | 71.4 | 13.2 | 110.1 | 3.8 |
| TOTAL A.W.E.S. | | 4659.5 | 4425.3 | 4905.5 | 3488.7 | 3091.0 | 2840.2 | 2887.3 | 2947.5 | 3157.8 | 2718.5 | 3791.5 | 3594.5 |
| JAPAN | | 7337.5 | 6708.3 | 5823.1 | 4859.4 | 7389.1 | 6040.0 | 4440.0 | 3431.6 | 3120.5 | 3360.7 | 5879.7 | 6116.4 |
| SOUTH KOREA | | 325.4 | 939.3 | 893.3 | 1001.5 | 2147.1 | 1180.9 | 806.5 | 1352.4 | 1942.6 | 1203.0 | 1671.4 | 2169.2 |
| CHINA | | | | 233.0 | 119.6 | 285.9 | 179.9 | 204.0 | 321.5 | 263.8 | 330.6 | 258.5 | 367.4 |
| POLAND | | | 208.4 | 146.0 | 133.3 | 489.8 | 417.1 | 270.3 | 321.4 | 302.6 | 218.4 | 209.5 | 218.4 |
| USSR | | | 12.1 | 24.0 | 68.4 | | 2.9 | | | | 92.6 | 214.1 | 209.1 |
| YUGOSLAVIA | | | 242.3 | 76.8 | 320.0 | 123.8 | 75.0 | 329.6 | 447.3 | 130.8 | 306.9 | 478.5 | 322.6 |
| REST OF WORLD | | 3659.9 | 1822.0 | 1951.4 | 1542.3 | 1323.4 | 1041.7 | 1383.7 | 660.4 | 822.0 | 895.2 | 1061.1 | 1285.9 |
| TOTAL WORLD | | 15982.3 | 14357.7 | 14053.1 | 11533.2 | 14850.1 | 11777.7 | 10321.4 | 9482.1 | 9740.1 | 9125.9 | 13564.3 | 14303.5 |

Source: Commission/LMIS contract

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TABLE 6 B - NEW ORDERS

MARKET SHARES

FIGURES AT THE END OF THE YEAR

| | | 1976 | 1980 | 1981 | 1982 | 1983 | 1984 | 1985 | 1986 | 1987 | 1988 | 1989 | 1990 |
|----------------|----------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| E.E.C. | F.R.GERMANY | 4.5% | 4.3% | 6.2% | 6.2% | 3.7% | 5.5% | 7.9% | 3.5% | 5.5% | 7.2% | 6.9% | 3.4% |
| | BELGIUM | 0.5% | 0.4% | 0.6% | 0.4% | 0.4% | 0.6% | 0.3% | 0.5% | 0.3% | 0.6% | 0.7% | 0.5% |
| | DENMARK | 2.0% | 2.0% | 2.1% | 2.2% | 2.9% | 3.4% | 0.8% | 3.2% | 2.3% | 2.2% | 1.4% | 4.2% |
| | FRANCE | 0.4% | 3.9% | 2.4% | 1.5% | 0.9% | 0.9% | 2.5% | 1.4% | 0.6% | 2.2% | 1.2% | 1.0% |
| | GREECE | | 0.6% | 0.0% | 0.1% | 0.0% | 0.1% | 0.3% | 0.1% | 0.1% | 0.1% | 0.0% | 0.0% |
| | IRELAND | 0.1% | 0.0% | 0.1% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| | ITALY | 1.9% | 1.6% | 1.0% | 2.1% | 0.4% | 0.6% | 2.5% | 2.4% | 4.2% | 1.9% | 4.2% | 2.9% |
| | NETHERLANDS | 3.9% | 2.6% | 2.6% | 2.7% | 1.6% | 2.1% | 2.6% | 1.4% | 0.9% | 3.9% | 1.7% | 1.9% |
| | UNITED KINGDOM | 3.9% | 2.4% | 2.9% | 2.6% | 1.0% | 0.9% | 2.2% | 1.2% | 1.2% | 1.4% | 1.5% | 1.4% |
| | SPAIN | 1.9% | 5.1% | 4.8% | 2.8% | 1.5% | 0.8% | 1.9% | 2.7% | 4.3% | 5.0% | 2.0% | 3.4% |
| | PORTUGAL | 0.5% | 0.2% | 0.4% | 0.2% | 0.2% | 0.3% | 0.0% | 0.3% | 0.8% | 0.4% | 0.5% | 0.6% |
| TOTAL | | 19.6% | 23.1% | 23.2% | 20.8% | 12.7% | 15.1% | 21.1% | 16.7% | 20.2% | 24.8% | 20.3% | 19.3% |
| EX - R.D.A. | | | | 2.7% | 4.5% | 4.6% | 3.6% | 4.0% | 10.2% | 3.5% | 2.5% | 3.4% | 2.7% |
| OTHER | FINLAND | | 3.6% | 3.6% | 1.9% | 0.9% | 3.3% | 1.5% | 2.1% | 6.5% | 1.2% | 0.5% | 1.8% |
| A.W.E.S. | NORWAY | | 2.7% | 2.9% | 1.4% | 0.7% | 1.8% | 1.3% | 1.4% | 1.4% | 1.2% | 2.9% | 1.3% |
| | SWEDEN | | 1.4% | 2.6% | 1.6% | 1.9% | 0.3% | 0.2% | 0.6% | 0.7% | 0.1% | 0.8% | 0.0% |
| TOTAL A.W.E.S. | | 29.2% | 30.8% | 34.9% | 30.2% | 20.8% | 24.1% | 28.0% | 31.1% | 32.4% | 29.8% | 28.0% | 25.1% |
| JAPAN | | 45.9% | 46.7% | 41.4% | 42.1% | 49.8% | 51.3% | 43.0% | 36.2% | 32.0% | 36.8% | 43.3% | 42.8% |
| SOUTH KOREA | | 2.0% | 6.5% | 6.4% | 8.7% | 14.5% | 10.0% | 7.8% | 14.3% | 19.9% | 13.2% | 12.3% | 15.2% |
| CHINA | | | | 1.7% | 1.0% | 1.9% | 1.5% | 2.0% | 3.4% | 2.7% | 3.6% | 1.9% | 2.7% |
| POLAND | | | 1.5% | 1.0% | 1.2% | 3.3% | 3.5% | 2.6% | 3.4% | 3.1% | 2.4% | 1.5% | 1.5% |
| USSR | | | 0.1% | 0.2% | 0.6% | | 0.0% | | | | 1.0% | 1.6% | 1.5% |
| YUGOSLAVIA | | | 1.7% | 0.5% | 2.8% | 0.8% | 0.6% | 3.2% | 4.7% | 1.3% | 3.4% | 3.5% | 2.3% |
| REST OF WORLD | | 22.9% | 12.7% | 13.9% | 13.4% | 8.9% | 8.8% | 13.4% | 7.0% | 8.4% | 9.8% | 7.8% | 9.0% |
| TOTAL WORLD | | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

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Source: Commission/LMIS contract

TABLE 7 - BREAKDOWN OF ORDERS BY FLAGS

ORDERS PLACED FOR REGISTRATION UNDER THE FLAG OF A COMMUNITY MEMBER STATE

| | 1976 | | | 1982 | | | 1984 (1) | | | 1986 | | | 1987 | | | 1988 | | | 1989 | | | 1990 | | |
|--|-------|---|----|-------|---|----|----------|-----|------|-------|-----|------|-------|-----|------|-------|-----|------|-------|-----|------|-------|-----|------|
| with shipyard in : A - national B - other EC countries C - third countries | A | B | C | A | B | C | A | B | C | A | B | C | A | B | C | A | B | C | A | B | C | A | B | C |
| % du total | 64 | 5 | 31 | 77 | 1 | 22 | 63,9 | 3,9 | 32,2 | 76,6 | 7,0 | 16,4 | 77,6 | 3,3 | 19,1 | 79,6 | 5,8 | 14,6 | 54,2 | 3,8 | 42,0 | 59,8 | 8,8 | 31,4 |
| TOTAL en '000 cgrt/cgt | 3.027 | | | 1.876 | | | 2.039 | | | 1.297 | | | 1.737 | | | 1.243 | | | 2.073 | | | 2.153 | | |

ORDERS RECEIVED BY COMMUNITY SHIPYARDS

| | 1976 | | | 1982 | | | 1984 (1) | | | 1986 | | | 1987 | | | 1988 | | | 1989 | | | 1990 | | |
|---|-------|---|----|-------|---|----|----------|-----|------|-------|-----|------|-------|-----|------|-------|-----|------|-------|-----|------|-------|-----|------|
| from shipowner in : A - national B - other EC countries C - third countries | A | B | C | A | B | C | A | B | C | A | B | C | A | B | C | A | B | C | A | B | C | A | B | C |
| % du total | 70 | 5 | 25 | 73 | 1 | 26 | 78,8 | 4,7 | 16,6 | 62,8 | 5,8 | 31,4 | 68,3 | 3,0 | 28,7 | 43,8 | 3,2 | 53,0 | 40,8 | 2,8 | 56,4 | 40,9 | 6,1 | 53,0 |
| TOTAL en 1000 cgt/cgt | 2.756 | | | 1.988 | | | 1.657 | | | 1.581 | | | 1.971 | | | 2.260 | | | 2.754 | | | 3.143 | | |

(1) Serie revised in March 1986

Source : Commission/Lloyd's Maritime Information Services contract

Remarks : 1976 - EEC excluding Greece; from 1986 - EEC including Spain and Portugal, 1990 - EEC including Ex-GDR

There may be slight differences in the total compared with similar data in other tables.

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TABLE 8 - TREND OF NEW ORDERS BY TYPE OF VESSEL

| | Oil tankers | | Bulk carriers | | Cargo ships | | Non-cargo vessels | | TOTAL (including unspecified) | |
|----------------|-------------|------|---------------|------|-------------|------|-------------------|------|----------------------------------|------|
| | 1000 cgrt | % | 1000 cgrt | % | 1000 cgrt | % | 1000 cgrt | % | 1000 cgrt | % |
| 1977 World | 790.6 | | 1.783.2 | | 8 497.3 | | 2.969.8 | | 14.040.9 | |
| EEC | 30.9 | 3.9 | 75.1 | 4.2 | 1.764.4 | 20.8 | 670.5 | 22.6 | 2.540.9 | 18.1 |
| 1978 World | 1.185.4 | | 534.8 | | 6.163.8 | | 1.912.7 | | 10.796.7 | |
| EEC | 56.2 | 4.7 | 23.6 | 4.4 | 1.341.3 | 21.8 | 591.5 | 20.3 | 2.012.6 | 18.6 |
| 1979 World | 3.364.8 | | 2.744.9 | | 5 148.4 | | 2.949.8 | | 14.207.9 | |
| EEC | 168.1 | 5.0 | 466.5 | 17.0 | 1 172.6 | 22.8 | 747.6 | 25.3 | 2.554.8 | 18.0 |
| 1980 World | 2.960.2 | | 4 325.3 | | 4 780.1 | | 2.291.9 | | 14.357.5 | |
| EEC | 273.7 | 9.2 | 425.9 | 9.8 | 1.023.4 | 21.4 | 740.8 | 32.3 | 2.463.8 | 17.2 |
| 1981 World | 1.166.7 | | 4 934.9 | | 4.967.9 | | 2.433.0 | | 14.053.1 | |
| EEC | 75.1 | 6.4 | 487.9 | 9.9 | 1.342.7 | 27.0 | 606.4 | 24.9 | 2 525.2 | 18.0 |
| 1982 World | 662.6 | | 2.335.3 | | 5 679.9 | | 2.135.4 | | 10.813.2 | |
| EEC | 70.3 | 10.6 | 197.5 | 8.5 | 1.093.2 | 22.0 | 628.0 | 29.4 | 1.989.0 | 18.4 |
| 1983 World | 1.682.1 | | 5.370.3 | | 5.910.8 | | 1.886.9 | | 14.850.1 | |
| EEC | 92.3 | 5.5 | 110.7 | 2.1 | 1.039.9 | 17.6 | 380.9 | 20.2 | 1.623.8 | 10.9 |
| 1984 World | 1.176.2 | | 3.890.6 | | 4 742.2 | | 1.956.8 | | 12.088.7 | |
| EEC | 179.3 | 15.2 | 165.6 | 4.3 | 944.2 | 19.9 | 448.8 | 22.9 | 1.815.7 | 14.5 |
| | 1000 cgt | % | 1000 cgt | % | 1000 cgt | % | 1000 cgt | % | 1000 cgt | % |
| 1984 World (1) | 470.1 | | 3.918.4 | | 5.299.9 | | 2.089.2 | | 11.777.6 | |
| EEC (1) | 15.3 | 3.3 | 152.8 | 3.9 | 1 029.7 | 19.4 | 459.3 | 22.0 | 1.657.2 | 14.1 |
| 1985 World | 575.4 | | 2.454.5 | | 5 138.8 | | 2 152.4 | | 10.321.3 | |
| EEC | 18.0 | 3.1 | 154.9 | 6.3 | 1 033.5 | 20.1 | 769.6 | 35.8 | 1.975.8 | 19.1 |
| 1986 World | 1.199.7 | | 1 296.0 | | 4 208.4 | | 2.778.0 | | 9.482.0 | |
| EEC | 0.0 | 0.0 | 108.0 | 8.3 | 788.6 | 18.3 | 704.7 | 25.4 | 1.581.3 | 16.7 |
| 1987 World | 1.404.6 | | 1.033.2 | | 4 899.7 | | 2.402.7 | | 9.740.2 | |
| EEC | 107.5 | 7.7 | 45.3 | 4.4 | 1 128.1 | 23.0 | 690.1 | 28.7 | 1.971.0 | 20.2 |
| 1988 World | 781.8 | | 2.164.5 | | 3.985.6 | | 2.194.0 | | 9.125.9 | |
| EEC | 116.7 | 14.9 | - | 0.0 | 1.095.5 | 27.5 | 1.048.1 | 47.8 | 2.260.4 | 24.8 |
| 1989 World | 1.943.6 | | 2.483.1 | | 6.798.4 | | 2.339.3 | | 13.564.3 | |
| EEC | 219.9 | 11.3 | 70.8 | 2.9 | 1.454.3 | 21.4 | 1.008.8 | 43.1 | 2.753.9 | 20.3 |
| 1990 World | 4.127.9 | | 1.639.0 | | 6 530.2 | | 2.006.5 | | 14.303.5 | |
| EEC | 542.6 | 13.1 | 207.0 | 12.6 | 1.154.4 | 17.7 | 849.9 | 42.4 | 2.753.9 | 19.3 |
| Ex-GDR | - | 0.0 | - | 0.0 | 386.6 | 5.9 | 2.5 | 0.1 | 389.1 | 2.7 |

Source : Contrat CEE/Lloyd's Maritime Information Services

Remarks : From 1986 EEC including Spain and Portugal

(1) Series revised in March 1986

TABLE 9 A - ORDER BOOK

1 000 CGT

| | | FIGURES AT THE END OF THE YEAR | | | | | | | | | | | |
|----------------|----------------|--------------------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| | | 1976 | 1980 | 1981 | 1982 | 1983 | 1984 | 1985 | 1986 | 1987 | 1988 | 1989 | 1990 |
| E.E.C. | F.R.GERMANY | 2113.3 | 950.9 | 994.0 | 990.1 | 649.5 | 607.1 | 809.3 | 529.7 | 686.9 | 856.4 | 1314.6 | 1192.4 |
| | BELGIUM | 277.0 | 331.7 | 311.5 | 261.1 | 143.7 | 136.1 | 62.1 | 60.0 | 75.0 | 82.0 | 147.7 | 154.4 |
| | DENMARK | 923.5 | 652.4 | 618.9 | 603.9 | 707.7 | 692.2 | 442.1 | 429.8 | 473.9 | 459.6 | 589.7 | 927.7 |
| | FRANCE | 1770.4 | 1193.7 | 1138.2 | 978.5 | 598.6 | 263.3 | 382.7 | 371.2 | 234.5 | 379.9 | 361.9 | 397.2 |
| | GREECE | | 240.6 | 245.4 | 191.4 | 146.1 | 137.4 | 119.9 | 102.8 | 121.5 | 116.8 | 113.6 | 69.1 |
| | IRELAND | 43.9 | 17.8 | 19.3 | 20.0 | 2.1 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| | ITALY | 1036.2 | 639.8 | 427.3 | 480.4 | 356.3 | 195.5 | 345.5 | 465.8 | 864.8 | 904.2 | 1188.6 | 1298.4 |
| | NETHERLANDS | 917.1 | 493.7 | 551.7 | 498.8 | 308.8 | 331.6 | 300.3 | 195.6 | 141.8 | 365.1 | 414.5 | 443.4 |
| | UNITED KINGDOM | 1989.4 | 615.0 | 768.9 | 714.1 | 506.1 | 292.3 | 352.5 | 325.4 | 369.7 | 317.1 | 376.5 | 418.9 |
| | SPAIN | | 1769.5 | 1754.0 | 1325.3 | 967.4 | 690.5 | 491.5 | 527.7 | 635.6 | 837.7 | 853.7 | 1004.1 |
| | PORTUGAL | | 191.2 | 240.4 | 258.4 | 124.1 | 138.3 | 94.0 | 67.0 | 108.3 | 114.0 | 155.7 | 181.6 |
| TOTAL | | 9070.8 | 7096.3 | 7069.6 | 6322.0 | 4510.4 | 3484.3 | 3399.9 | 3075.0 | 3712.0 | 4432.8 | 5516.5 | 6087.2 |
| EX - R.D.A | | | | 88.0 | 187.6 | 528.6 | 352.3 | 309.6 | 752.0 | 739.4 | 572.8 | 659.4 | 762.6 |
| OTHER | FINLAND | | 1144.3 | 1139.5 | 1023.8 | 710.3 | 642.2 | 544.4 | 483.9 | 991.0 | 962.9 | 652.1 | 589.4 |
| A.W.E.S. | NORWAY | | 589.3 | 670.3 | 371.9 | 185.6 | 229.8 | 148.1 | 146.8 | 136.9 | 114.3 | 422.8 | 463.6 |
| | SWEDEN | | 703.8 | 646.3 | 494.9 | 494.5 | 267.8 | 181.7 | 137.5 | 93.8 | 39.0 | 115.3 | 64.3 |
| TOTAL A.W.E.S. | | 15839.2 | 9533.7 | 9613.7 | 8400.2 | 6429.4 | 4976.4 | 4583.7 | 4595.2 | 5673.1 | 6121.8 | 7366.1 | 7967.1 |
| JAPAN | | 12093.8 | 7297.8 | 7457.7 | 6640.2 | 8477.9 | 8221.5 | 5915.2 | 3915.9 | 2918.5 | 3473.9 | 5696.5 | 7494.7 |
| SOUTH KOREA | | 7843.2 | 1320.3 | 1711.1 | 1854.9 | 2898.4 | 3223.1 | 2578.7 | 1909.2 | 2639.1 | 2342.7 | 2813.1 | 3500.7 |
| CHINA | | | | 260.9 | 298.3 | 493.5 | 433.2 | 486.5 | 547.0 | 647.3 | 809.8 | 681.0 | 813.6 |
| POLAND | | | 1634.6 | 1459.0 | 1174.6 | 1143.1 | 1272.1 | 1018.1 | 1041.6 | 1251.6 | 1131.3 | 1080.1 | 1136.6 |
| USSR | | | | 128.9 | 92.7 | 53.9 | 42.8 | | | | 74.1 | 248.5 | 343.1 |
| YUGOSLAVIA | | | 760.7 | 626.7 | 699.9 | 492.6 | 455.4 | 545.9 | 840.0 | 751.4 | 861.9 | 1011.4 | 1046.9 |
| REST OF WORLD | | 3692.9 | 5045.1 | 5105.6 | 4570.7 | 4129.7 | 3448.0 | 3435.8 | 2796.8 | 2675.0 | 2857.9 | 3071.2 | 3343.5 |
| TOTAL WORLD | | 39569.1 | 25592.2 | 26363.6 | 23731.5 | 24118.5 | 22072.5 | 18563.9 | 15645.7 | 16556.0 | 17673.4 | 21967.9 | 25646.2 |

Source: Commission/LMIS contract

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TABLE 9 B - ORDER BOOK

MARKET SHARES

| | | FIGURES AT THE END OF THE YEAR | | | | | | | | | | | |
|----------------|----------------|--------------------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| | | 1976 | 1980 | 1981 | 1982 | 1983 | 1984 | 1985 | 1986 | 1987 | 1988 | 1989 | 1990 |
| E.E.C. | F.R.GERMANY | 5.3% | 3.7% | 3.8% | 4.2% | 2.7% | 2.8% | 4.4% | 3.4% | 4.1% | 4.8% | 6.0% | 4.6% |
| | BELGIUM | 0.7% | 1.3% | 1.2% | 1.1% | 0.6% | 0.6% | 0.3% | 0.4% | 0.5% | 0.5% | 0.7% | 0.6% |
| | DENMARK | 2.3% | 2.5% | 2.3% | 2.5% | 2.9% | 3.1% | 2.4% | 2.7% | 2.9% | 2.6% | 2.7% | 3.6% |
| | FRANCE | 4.5% | 4.7% | 4.3% | 4.1% | 2.5% | 1.2% | 2.1% | 2.4% | 1.4% | 2.1% | 1.6% | 1.5% |
| | GREECE | | 0.9% | 0.9% | 0.8% | 0.6% | 0.6% | 0.6% | 0.7% | 0.7% | 0.7% | 0.5% | 0.3% |
| | IRELAND | 0.1% | 0.1% | 0.1% | 0.1% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| | ITALY | 2.6% | 2.5% | 1.6% | 2.0% | 1.5% | 0.9% | 1.9% | 3.0% | 5.2% | 5.1% | 5.4% | 5.1% |
| | NETHERLANDS | 2.3% | 1.9% | 2.1% | 2.1% | 1.3% | 1.5% | 1.6% | 1.3% | 0.9% | 2.1% | 1.9% | 1.7% |
| | UNITED KINGDOM | 5.0% | 2.4% | 2.9% | 3.0% | 2.1% | 1.3% | 1.9% | 2.1% | 2.2% | 1.8% | 1.7% | 1.6% |
| | SPAIN | | 6.9% | 6.7% | 5.6% | 4.0% | 3.1% | 2.6% | 3.4% | 3.8% | 4.7% | 3.9% | 3.9% |
| | PORTUGAL | | 0.7% | 0.9% | 1.1% | 0.5% | 0.6% | 0.5% | 0.4% | 0.7% | 0.6% | 0.7% | 0.7% |
| TOTAL | | 22.9% | 27.7% | 26.8% | 26.6% | 18.7% | 15.8% | 18.3% | 19.7% | 22.4% | 25.1% | 25.1% | 23.7% |
| EX - R.D.A. | | | | 0.3% | 0.8% | 2.2% | 1.6% | 1.7% | 4.8% | 4.5% | 3.2% | 3.0% | 3.0% |
| OTHER | FINLAND | | 4.5% | 4.3% | 4.3% | 2.9% | 2.9% | 2.9% | 3.1% | 6.0% | 5.4% | 3.0% | 2.3% |
| A.W.E.S. | NORWAY | | 2.3% | 2.5% | 1.6% | 0.8% | 1.0% | 0.8% | 0.9% | 0.8% | 0.6% | 1.9% | 1.8% |
| | SWEDEN | | 2.8% | 2.5% | 2.1% | 2.1% | 1.2% | 1.0% | 0.9% | 0.6% | 0.2% | 0.5% | 0.3% |
| TOTAL A.W.E.S. | | 40.0% | 37.3% | 36.5% | 35.4% | 26.7% | 22.5% | 24.7% | 29.4% | 34.3% | 34.6% | 33.5% | 31.1% |
| JAPAN | | 30.6% | 28.5% | 28.3% | 28.0% | 35.2% | 37.2% | 31.9% | 25.0% | 17.6% | 19.7% | 25.9% | 29.2% |
| SOUTH KOREA | | 20.1% | 5.2% | 6.5% | 7.8% | 12.0% | 14.6% | 13.9% | 12.2% | 15.9% | 13.3% | 12.8% | 13.6% |
| CHINA | | | | 1.0% | 1.3% | 2.0% | 2.0% | 2.6% | 3.5% | 3.9% | 4.6% | 3.1% | 3.2% |
| POLAND | | | 6.4% | 5.5% | 4.9% | 4.7% | 5.8% | 5.5% | 6.7% | 7.6% | 6.4% | 4.9% | 4.4% |
| USSR | | | | 0.5% | 0.4% | 0.2% | 0.2% | 0.2% | | | 0.4% | 1.1% | 1.3% |
| YUGOSLAVIA | | | 3.0% | 2.4% | 2.9% | 2.0% | 2.1% | 2.9% | 5.4% | 4.5% | 4.9% | 4.6% | 4.1% |
| REST OF WORLD | | 9.3% | 19.7% | 19.4% | 19.3% | 17.1% | 15.6% | 18.5% | 17.9% | 16.2% | 16.2% | 14.0% | 13.0% |
| TOTAL WORLD | | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: Commission/LMIS contract

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TABLE 10 - ORDER BOOKS AND DELIVERY SCHEDULE

| | 1990 | | | | | |
|--------------|------------------------|--|-------------------|---------|--------------------|-------|
| | 1000 cgt - coeff. 1984 | | | | | |
| | Prod. 1990 | Total order books at 31.12.90 | for delivery in : | | | |
| 1991 | | | 1992 | 1993 | 1994 and beyond | |
| Germany | 656,7 | 1.192,4 | 528,5 | 557,5 | 106,4 | - |
| Belgium | 71,7 | 154,4 | 69,8 | 58,3 | 26,4 | - |
| Denmark | 305,5 | 927,7 | 398,5 | 331,8 | 197,4 | - |
| France | 114,0 | 397,2 | 168,9 | 169,1 | 59,3 | - |
| Greece | 45,5 | 69,1 | 69,1 | - | - | - |
| Ireland | - | - | - | - | - | - |
| Italy | 327,6 | 1.298,4 | 605,1 | 243,8 | 299,1 | 150,5 |
| Netherlands | 263,5 | 443,4 | 382,2 | 52,4 | 8,8 | - |
| UK | 144,6 | 418,9 | 173,8 | 207,3 | 37,8 | - |
| Spain | 364,8 | 1.004,1 | 548,9 | 329,1 | 89,2 | 36,8 |
| Portugal | 64,6 | 181,6 | 127,9 | 38,2 | 15,5 | - |
| TOTAL EEC 12 | 2.358,5 | 6.087,2 | 3.072,7 | 1.987,5 | 839,9 | 187,3 |
| Ex-GDR | 344,9 | 762,6 | 335,5 | 212,0 | 201,8 | 13,3 |

Source : Contrat OCE/Lloyd's Maritime Information Services

TABLE 11 - EMPLOYMENT IN CONSTRUCTION OF NEW VESSELS IN THE COMMUNITY

| | 1975 | 1978 | 1979 | 1980 | 1981 | 1982 | 1983 | 1984 | 1985 | 1986 | 1987 | 1988 | 1989 | 1990 |
|----------------|---------|---------|---------|---------|---------|---------|---------|--------|------------|--------|------------|-----------|-----------|------------|
| Belgium | 7.487 | 6.614 | 6.258 | 6.523 | 6.347 | 4.680 | 4 104 | 4.060 | 3.923 | 2.995 | 2.548 | 2.270 | 2.307 | 2.377 |
| Denmark | 18.630 | 12.000 | 9.000 | 11.400 | 11.350 | 11.800 | 11.200 | 10.300 | 10.200 | 7.000 | 7.000 | 7.300 | 7.900 | 8.400 |
| France (1) | 32.500 | 25.300 | 23.000 | 22.200 | 22.200 | 21 600 | 21.000 | 16.940 | 15.053 | 13.700 | 8.940 | 6.850 | 6.800 | 6.600 |
| Germany | 46.839 | 31.113 | 27.369 | 24.784 | 26 521 | 27.600 | 25.966 | 22.183 | 22.260 | 18 184 | 12.875 | 14.845 | 14.732 | (6) 15.297 |
| Greece | 2.318 | : | : | 2.672 | 3.393 | 2.900 | 2.812 | 2.000 | 2.000 | 1 709 | 1.621 | 1.855 | (5) 1.535 | 550 |
| Ireland | 869 | 840 | 750 | 750 | 762 | 882 | 550 | - | - | - | - | - | - | - |
| Italy | 25.000 | 20 000 | 19.000 | 18.000 | 16.500 | 13.750 | 12 800 | 12.800 | 12 000 | 11.570 | (4) 9.500 | (4) 8 428 | (4) 9.675 | (7) 9.840 |
| Netherlands(2) | 22 662 | 17 540 | 14.540 | 13 100 | 13 100 | 12 800 | 11 250 | 10.330 | 6 236 | 5.400 | 3 600 | 3 500 | 3 500 | 3.900 |
| UK | 54.550 | 41.050 | 31.200 | 24.800 | 25.345 | 25.000 | 20 486 | 14 655 | 10 200 (3) | 8.500 | (3) 8.000 | (3) 5 500 | (3) 4.124 | (3) 4.006 |
| TOTAL EEC 10 | 208.833 | 154.457 | 132.017 | 124.229 | 125 518 | 121 012 | 110 168 | 93 274 | 81 877 | 69.058 | 54 084 | 50 548 | 50.573 | 50.970 |
| Spain | : | : | : | : | : | : | : | - | 18.000 | 18 000 | (4) 17.300 | 14.000 | 12.550 | 11.940 |
| Portugal | : | : | : | : | : | : | : | - | 5 370 | 5.087 | 5.020 | 4 412 | 4.245 | 3.845 |
| TOTAL EEC 12 | : | : | : | : | : | : | : | : | 105.247 | 92 145 | 76.404 | 68.960 | 67.368 | 66.745 |

(Table compiled from national sources)

(1) From 1986 on the figure covers jobs in new shipbuilding and naval and para-naval building (conversion, naval vessels and off-shore vessels)
The figure for the preceding years using the same method are 1975 32 500, 1980 23.700, 1985 : 17.700

(2) From 1975 to 1984 = including naval dockyards estimated to be
1975 : 1.800; 1978 and 1979 : 3 200; 1980 3 400, 1981 et 1982 3 200; 1983 et 1984 2 800

(3) Excluding jobs in Harland & Wolff (Northern Ireland).
This figure for 1985 and 1986 was 4.000; for 1987 and 1988 was 3.500, for 1989 was 2.370 and for 1990 was 2450

(4) 2.780 unemployed should be added to this figure for 1987, 2 850 for 1988 and 2 581 for 1989, of these 2 000 represent a structural overcapacity for whom no new jobs can be found.

(5) Includes Naval Building

(6) Excluding jobs in Ex-GDR's yards

(7) of which 1.838 currently inactive

: Unavailable.

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TABLE 12

RENAVAL ZONES

| | |
|---|--|
| B | I |
| St Nikolaas - Antwerpen | Genova Trieste Venezia |
| DK | |
| Aalborg* Vest Lolland* | NL |
| | Rhijn-Delta* Amsterdam-Noord* |
| ESP | |
| Pais Vasco | P |
| | Setubal* |
| D | |
| Bremen* Emden* Lübeck* Hamburg* | UK |
| | Plymouth* Strathclyde Fife Tyne and Wear* Cleveland* Merseyside |
| F | |
| Loire-Atlantique* Dunkerque* Haute Normandie* Basse Normandie Provence Charente* | |

* Zones with corresponding operational programmes approved; for the other zones the programmes will be approved in December 1991.

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ANNEX 2

GLOSSARY

GLOSSARY

1. Tonnage Measurement

The word "tonnage" is a term used to give an indication of a ship's size. It can have widely differing meanings depending upon the purpose of the assessment, e.g. measuring the vessel's volumetric capacity or its weight carrying capacity.

Measurement systems have, therefore, been laid down in tonnage regulations for specific purposes but, due to differences in national criteria used, the outcome is not necessarily the same for similar vessels registered under different flags.

On 18 July 1982, the 1969 IMO Convention on Tonnage Measurement for Ships entered into force, affecting all ships built after that date for registration in signatory countries. Thus, a uniform system for the calculation of two of the most important notions, viz. "gross tonnage" and "net tonnage", is now being applied to an increasing number of ships of the world fleet.

2. Types of tonnage

- Displacement tonnage

A ship's displacement is the weight of water displaced by the ship; the displacement tonnage equals the sum of the ship's actual weight (lightweight) and its maximum allowed contents (deadweight).

- Lightweight tonnage

The lightweight is the weight of the ship as built (hull, outfit and machinery) including boiler water, lubricating oil and the cooling water system's contents.

(Commercially it is almost only employed when considering the scrapping value of a ship).

- Deadweight tonnage (dwt)

Deadweight is the total sum of the weight of the cargo which a ship can carry and the weights of its fuel, stores, water ballast, fresh water, crew and passengers plus baggage. It represents the difference between the loaded ship displacement and the lightweight.

(Commercially it is the notion most commonly used by shipowners in order to assess the transport capacity of a vessel in relation to heavy and/or bulk cargoes).

- Gross register tonnage (grt)

grt is a value calculated according to various national regulations in order to indicate the volumetric internal capacity of the ship, certain spaces being, however, exempted; it is expressed in gross register tons of 100 cubic feet or 2.83 m³.

(Before the coming into force of gt regulations it was widely used for registration purposes, levying of harbour fees and duties, etc).

- Net register tonnage (nrt)

nrt is equally a calculated value supposed to represent the earning capacity of the ship; it is obtained by deducting certain non revenue-earning spaces from the grt and it is accordingly expressed in 100 cubic feet units or 2.83m².

(Its use is similar to that of grt but less frequent and mainly as the basis for port charges).

- Gross tonnage (gt)

gt is the tonnage calculated according to the 1969 Tonnage Measurement Convention. It is a dimensionless value now gradually replacing grt for all official purposes concerning vessels under flags of signatory countries.

(The commercial and legal applications of gt will make it the most widely used parameter).

- Net tonnage (nt)

Net tonnage is likewise calculated according to a formula laid down by the 1969 Tonnage Measurement Convention. It is also a dimensionless value and not be taken as less than 0.30 gt.

(It replaces nrt in many of its former applications but there is a tendency towards a more universal use of gt for harbour and canal duties.)

3. Compensated gross register tonnes (cgrt)

Compensated gross tonnes (cgt)

The volume of work that goes into building a vessel is not directly related to its size but also depends on its type, degree of technical sophistication etc. For statistical purposes, regarding the output and order intake of the shipbuilding industry, the AWES as well as the OECD developed in the late sixties a series of special coefficients, for different ship types and sizes, by means of which the work content involved in the building of homogeneous groups of vehicles could be assessed from their grt values ($\text{grt} \times \text{coefficient} = \text{cgrt}$).

Initially the AWES and the OECD coefficients diverged markedly, but in 1977 new coefficients for cgrt calculations were developed by the AWES, which were subsequently also agreed upon by the OECD. This explains why certain 1976 (or earlier) OECD statistics in cgrt are not, or not always, comparable with other series.

With the coming into force, in 1982, of the IMO Convention it became again necessary to modify the compensated tonnage calculation system, in order to take into account that for certain ship types (in particular RoRo-vessels, car ferries and vehicle carriers) gt values have increased considerably as compared with grt values. Moreover, recent ships of these types tend to be of more complex build and new coefficients have, therefore, been adopted. They are applicable as from 1 January 1984.

4. Compatibility of OECD and LMIS statistics

The data for the OECD statistics are supplied by the OECD member governments. Where the Member States are concerned they constitute, therefore, an official source, but since the data only refer to the situation in the OECD member countries they cannot be used for making worldwide comparisons. Moreover, the calculation of cgt (or cgrt) values is carried out by the respective administrations so that discrepancies may sometime arise as to when an order is regarded as being definite, in the classification of vessels and as to what coefficient should be used for establishing cgt for certain vessels of a hybrid type.

The data produced by Lloyd's Maritime Information Services (LMIS) are not infallible either, but because they are gathered worldwide by LMIS own outposts according to uniform criteria, they constitute a more homogeneous source of information allowing comparisons on a global level to be made.

LMIS supplies information to the Commission under a contract and the basic data only contain gt (or grt) and dwt references. The cgt (or cgrt) values are calculated at the Commission's Joint Research Centre in Ispra by computer processing of the LMIS input, using the OECD calculation coefficients.

Despite certain differences which can sometimes arise from the different procedures for establishing the OECD and the LMIS/Commission series of statistics, the two sets of data show trends which generally point in the same direction. Since the divergence between the two sources is only random, and the present report is essentially concerned with indicating the main trends, the reference to only one source is generally of no consequence.