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Foreword

This is the latest in a series of Bureau of Transport and Regional Economics (BTRE) papers that provide information on Australian sea freight movements. This paper covers all sea freight activity around Australia during 2004–05.

Quarterly updates of selected tables in the publication are available at <<http://www.btre.gov.au>>.

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Bundaberg Port Authority	Newcastle Port Corporation
Burnie Port Corporation	Northern Forest Products
Cairns Port Authority	Ord River District Cooperative – Wyndham
Central Queensland Ports Authority	One Steel Ltd
Chevron Australia Pty Ltd	Perkins Shipping Pty Ltd
Christmas & Cocos (Keeling) Islands Port Authority	Port Hedland Port Authority
Dampier Port Authority	Port Kembla Port Corporation
Darwin Port Corporation	Port of Brisbane Corporation
Dampier Salt	Port of Devonport Corporation
Department of Transport, Western Australia	Port of Launceston Pty Ltd
Derby-West Kimberley Shire Administration	Port of Portland Pty Ltd
Esperance Port Authority	Ports Corporation of Queensland
Flinders Ports Pty Ltd	Samancor Gemco
Flinders Island Ports Company Pty Ltd	Santos Limited
Fremantle Port Authority	Sea Swift
Geraldton Port Authority	Southern Shipping
Gippsland Ports Committee of Management	Sydney Ports Corporation
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Scope and coverage

Australian Sea Freight, 2004–05 is set out in six chapters.

- Chapter 1 is a summary chapter.
- Chapter 2 covers international sea freight into and out of Australia.
- Chapter 3 contains details of interstate and intrastate cargo loaded and unloaded at Australian ports. It excludes some trade from small craft at isolated locations in northern and western regions of Australia. Cargo loaded or unloaded at Christmas Island, the Cocos (Keeling) Islands and Norfolk Island is also excluded.
- Chapter 4 covers single and continuing voyage permits.
- Chapter 5 provides information about ship and cargo movements through Australian ports.
- Chapter 6 contains details of the Australian trading fleet during the period 2004–05.

Chapter 1: Overview

In 2004–05, 787.7 million tonnes of cargo moved across Australian wharves. This represented a 7.8 per cent increase over 2003–04. Seventy seven and a half per cent of this cargo was international exports; 8.9 per cent international imports; 6.8 per cent was coastal cargo loaded; and 6.8 per cent was coastal cargo unloaded.

International sea freight

In 2004–05, 680.6 million tonnes of international cargo moved across Australian wharves (Table 1.1). Compared to 2003–04, this represents a 9.4 per cent increase in exports and an 8.9 per cent increase in imports by weight. There was a 19 per cent increase in exports, and a 16.5 per cent increase in imports, by value, between 2003–04 and 2004–05.

Table 1.1: Summary of international sea freight, 11 years to 2004–05

Financial year	Value			Weight		
	Exports \$ Billion	Imports \$ Billion	Total \$ Billion	Exports Million Tonnes	Imports Million Tonnes	Total Million Tonnes
1994–95	53.0	54.5	107.6	362.4	45.9	408.3
1995–96	60.0	55.8	115.8	372.9	47.1	420.0
1996–97	63.4	56.9	120.4	404.0	49.8	453.8
1997–98	69.6	64.1	133.7	427.1	51.9	479.0
1998–99	68.2	68.5	136.7	431.8	56.3	488.1
1999–00	78.2	76.5	154.6	462.0	56.7	518.7
2000–01	99.4	83.0	182.3	495.0	55.0	550.0
2001–02	99.5	85.2	184.7	501.0	57.8	558.7
2002–03	93.4	94.9	188.4	529.4	62.2	591.6
2003–04	89.3	93.5	182.8	558.3	64.2	622.5
2004–05	106.3	108.9	215.3	610.6	69.9	680.6

Source: ABS 2007.

Coastal freight

In 2004–05, Australian ports handled 107.1 million tonnes of coastal cargo. This represented 13.6 per cent of all cargo moved across Australian wharves. Of this amount, 53.7 million tonnes of coastal cargo was loaded and 53.4 million tonnes was unloaded (Table 1.2). The discrepancy between loaded and unloaded is primarily due to cargo on ships in transit at the start and end of the year, as explained in the section on statistical issues at the end of this paper.

Table 1.2: Summary of Australian coastal freight, 11 years to 2004–05

Financial year	Loaded			Unloaded		
	Interstate	Intrastate	Total	Interstate	Intrastate	Total
	<i>Million tonnes</i>					
1994–95	33.7	15.5	49.2	34.2	16.3	50.5
1995–96	32.0	15.8	47.8	31.8	16.2	48.0
1996–97	32.6	16.6	49.1	32.5	17.5	50.0
1997–98	34.3	18.2	52.5	34.7	19.0	53.7
1998–99	31.9	16.5	48.4	31.0	17.1	48.1
1999–00	32.7	18.6	51.3	32.4	18.4	50.7
2000–01	33.2	18.8	52.0	32.8	18.7	51.5
2001–02	32.5	19.9	52.4	33.2	19.7	52.8
2002–03	34.3	18.6	52.8	35.0	18.5	53.5
2003–04	34.8	18.4	53.2	35.5	19.6	55.1
2004–05	34.1	19.6	53.7	34.0	19.4	53.4

Source: BTRE 2007.

Compared to 2003–04, coastal cargo tonnages were down by nearly 1.1 per cent overall. Loaded cargo was up slightly (0.9 per cent) but was offset by unloaded cargo, which fell by 3.1 per cent. Based on cargo loaded, the Australian coastal fleet performed 114 billion tonne-kilometres in 2004–05, which was down 2.9 per cent on the previous year.

In 2004–05, ships using single voyage permits (SVPs) and continuous voyage permits (CVPs)¹ moved an estimated 13 million tonnes of freight around the Australian coast (Table 1.3). This was up from 12.3 million tonnes in 2003–04. Overall, coastal freight carried under permits was 24.3 per cent of the loaded coastal task.

Table 1.3: Summary of voyage permits used, 2004–05

Permit type	No of voyages Number	Freight carried Tonnes	TEUs carried Number
Single voyage permits	892	11 030 905	5 855
Continuing voyage permits	977	2 015 719	56 938
Total	1 869	13 046 624	62 793

Source: DOTARS 2007.

¹ Voyage permit information provided in this paper differs from that appearing in the BTRE's Waterline series. See Explanatory notes for further information.

Australian port activity

In 2004–05, there was an increase in the number of international trading ships entering Australia, the number of international voyages that trading ships made to Australia and the number of ports they visited (Table 1.4).

Table 1.4: Summary of Australian port visits, nine years to 2004–05

<i>Financial year</i>	<i>All ships involved in international shipping</i>	<i>Voyages by all ships involved in international shipping</i>	<i>Port calls by all ships involved in coastal and international shipping</i>
<i>Number</i>			
1996–97	2 870	8 138	18 643
1997–98	3 239	9 706	20 322
1998–99	3 187	9 744	20 899
1999–00	3 165	9 893	21 683
2000–01	3 162	9 738	21 542
2001–02	3 103	8 779	21 358
2002–03	3 140	8 935	23 454
2003–04	3 363	9 261	23 436
2004–05	3 540	10 034	25 348

Note: A ship which sails to Australia three times and makes a total of 15 port calls in Australia in a year, counts as one ship, three voyages and 15 ship calls or visits.

Source: LMIU 2007.

In 2004–05, the number of international voyages increased by 8.3 per cent, while ship calls increased by 8.2 per cent. The increase in ship activity had a predictable effect on the amount of cargo moving across Australian wharves, making 2004–05 the busiest period since 1996–97.

Australian fleet

The Australian merchant fleet increased in 2004–05, in terms of both gross and deadweight tonnage (Table 1.5). However, the total number of ships decreased by 3 to 79 vessels. In 2004–05, the number of small ships (mostly general cargo carriers) declined to 2 from 30 in the previous year. This decline was accompanied by a marked increase in larger ships (mostly bulk carriers) from 52 in 2003–04 to 77 in 2004–05. The expansion in large bulk carrier fleet followed an increased demand in Australia for dry bulk tonnage necessary to carry increased exports of minerals and energy commodities in 2004–05.

Table 1.5: Summary of Australian trading fleet, 11 years to 2004–05

Financial year	Small ships (less than 2000 dwt)	Large ships (greater than 2000 dwt)	Total number of ships	Deadweight tonnage	Gross registered tonnage
	Number			Tonnes	
1993–94	n/a	n/a	90	3 499 527	2 414 844
1994–95	n/a	n/a	85	3 203 623	2 298 894
1995–96	n/a	n/a	82	3 303 294	2 267 719
1996–97	n/a	n/a	76	3 164 568	2 238 141
1998–99	22	55	77	2 505 369	1 864 976
1999–00	23	54	77	2 283 336	1 729 770
2000–01	30	51	81	2 323 983	1 764 298
2001–02	23	54	77	2 028 637	1 587 743
2002–03	19	55	74	2 135 982	1 628 203
2003–04	30	52	82	2 052 795	1 643 709
2004–05	2	77	79	2 802 834	2 113 398

Note: Data for 1997–98 was not available.

Sources: DOTARS—personal communications; LMIU 2007; Fairplay 2005; AMSA 2005, Shipping, companies (various)—personal communications.

Chapter 2: International sea freight

In 2004–05, international sea freight to and from Australia increased by 17.8 per cent in value, and increased by 9.3 per cent in weight compared to 2003–04. The international sea freight task for exports increased in value by 19.1 per cent, while exports by weight increased by 9.4 per cent. International sea imports increased by 16.5 per cent in value and increased 9 per cent in weight.

Handling of Australia's international sea freight by Australian ports

In 2004–05, Western Australia had the largest volume of exports, by value and weight, followed by Queensland. New South Wales emerged as the state with the largest volume of imports by value with Queensland as the state with the largest volume of imports by weight (Table 2.1).

Table 2.1: International sea freight by Australian state and territory of origin and final destination, 2004–05

State/territory	Value		Weight	
	Imports \$ Thousand	Exports \$ Thousand	Imports Tonnes	Exports Tonnes
New South Wales	36 320 691	19 112 175	17 493 879	99 313 534
Victoria	35 515 990	15 447 166	16 688 297	12 870 350
Queensland	18 450 040	25 383 662	17 924 757	167 447 482
South Australia	5 272 866	6 923 857	2 857 608	8 926 182
Western Australia	11 265 355	31 318 798	11 823 186	305 912 794
Tasmania	716 941	2 412 822	989 091	7 297 562
Northern Territory	1 380 721	2 015 688	2 154 643	6 848 665
Australian Capital Territory	603		42	
State confidential ^a	0	474 899	1 141	1 566 963
Foreign origin ^b		3 251 832		456 469
Total	108 923 207	106 340 899	69 932 644	610 640 001

a State confidential refers to situations where ABS concludes that indicating state of origin or destination for cargo may lead to disclosure of commercially sensitive information.

b Foreign origin refers to commodities where no Australian origin is identified. Most of this category refers to transhipped cargo.

Note: Blank cells mean no data was recorded for this category, while cells with an entry of 0 mean that data was recorded but rounded to zero.

An update of this table is available on the BTRE website <<http://www.btre.gov.au>>.

Source: ABS 2007.

Analysis of Australian port of loading/unloading data (Table 2.2) shows that very little has changed since 1999–00 with Sydney continuing to be the port handling the largest volume of imports by weight and value, and Melbourne being the port handling the largest volume of exports by value. Port Hedland replaced Dampier as the port handling the largest volume of exports by weight.

Table 2.2: International sea freight by Australian ports, 2004–05

State/territory	Australian port	Value		Weight	
		Imports \$ Thousand	Exports \$ Thousand	Imports Tonnes	Exports Tonnes
New South Wales	Coffs Harbour	393	104	481	13
	Grafton	11	2 378	1	1 380
	Newcastle	584 428	6 009 553	1 192 136	80 791 051
	Port Kembla	366 176	2 809 765	2 274 655	12 165 272
	Sydney	36 347 627	9 426 039	14 175 665	4 380 957
	Twofold Bay	394	78 642	637	995 713
	Other ports	893	12 578	2	4 469
Victoria	Geelong	2 658 460	633 412	5 850 210	2 591 551
	Melbourne	35 403 665	18 246 441	11 039 330	9 180 872
	Portland	122 132	1 039 399	414 989	2 436 917
	Westernport	22 819	255 607	37 073	475 046
	Other ports		53 142		114 531
Queensland	Abbot Point		831 475		12 281 859
	Brisbane	15 819 272	8 681 300	10 911 307	9 233 114
	Bundaberg	11 908	64 119	5 716	243 926
	Cairns	253 554	376 651	361 598	829 802
	Gladstone	352 575	4 684 925	1 639 205	46 203 889
	Hay Point		7 395 058		84 815 221
	Innisfail		150 285		622 986
	Karumba	8	369 423	11	730 329
	Lucinda		196 070		676 853
	Mackay	133 646	449 508	239 171	2 681 805
	Rockhampton	18	13 978	16	7 879
	Thursday Island	6 060	3 565	965	2 062
	Townsville	752 640	3 088 958	4 445 940	4 302 854
	Weipa	32 832	102 246	65 217	4 408 291
	Other ports		18 449		811 721
	South Australia	Adelaide	2 587 273	4 424 890	2 008 231
Edithburg			21 938		126 369
Port Bonython			294 992		533 616
Port Lincoln		317 197	333 892	166 340	1 439 657
Port Pirie		10 114	171 511	12 026	306 170
Thevenard			25 533		455 626
Wallaroo		10 333	95 200	34 330	578 665
Whyalla		60 588	73 871	107 213	1 049 117
Other ports		43 909		295 023	

Table 2.2: International sea freight by Australian ports, 2004–05 (continued)

State/territory	Australian port	Value		Weight	
		Imports \$ Thousand	Exports \$ Thousand	Imports Tonnes	Exports Tonnes
Western Australia	Albany	43 552	514 418	148 780	2 784 376
	Broome	2 399	64 386	7 221	49 182
	Bunbury	209 943	2 558 654	1 153 728	9 192 138
	Cape Cuvier		56 596		2 623 428
	Carnarvon	669	2 940	28	286
	Dampier	1 083 914	11 481 795	522 975	103 244 592
	Derby	22		95	
	Esperance	68 691	1 086 727	191 500	7 381 189
	Fremantle/Perth	9 406 105	8 706 325	9 200 396	11 689 319
	Geraldton	148 898	1 066 400	156 805	5 223 603
	Port Hedland	214 146	3 722 772	449 006	103 570 688
	Port Walcott	16 057	1 656 766	25 323	56 443 065
	Useless Loop		12 694		813 055
	Wyndham	46 403	616 858	82 523	1 071 933
	Yampi Sound		17 833		416 738
	Other ports		194 797		2 203 675
Tasmania	Burnie	129 227	260 033	134 491	1 411 426
	Devonport	14 695	4 003	50 212	5 229
	Hobart	58 576	172 031	170 005	486 820
	Launceston	296 368	1 079 779	576 205	3 355 767
	Port Latta		46 765		701 253
	Spring Bay	2	66 570	0	791 126
	Stanley		11 405		138 533
	Other ports		5 152		44 882
Northern Territory	Darwin	1 123 829	858 624	1 113 469	228 328
	Confidential	202 716	961 057	966 043	5 303 358
	Other ports		161 813		481 883
State/territory confidential	Other confidential ports	1 977	474 899	1 371	1 566 963
Australia total		108 923 205	106 340 898	69 932 641	610 639 998

Note: Blank cells mean no data was recorded for this category, while cells with an entry of 0 mean that data was recorded but rounded to zero.

ABS records offshore exports such as crude oil through the nearest mainland port, although the actual cargo does not pass through the actual port. For example, most of the 1.1 million tonnes of exports through Wyndham, in Western Australia, are actually exported from offshore crude oil terminals.

An update of this table is available on the BTRE website <<http://www.btre.gov.au>>.

Source: ABS 2007.

Australia's trading partners

Europe continues to be Australia's largest supplier by value, followed by South East Asia and East Asia. South East Asia was also Australia's largest source of imports in terms of weight (Table 2.3). Figures 2.1 and 2.2 show the information on value of international sea freight by region of origin and final destination respectively.

Japan and North Asia were Australia's largest export markets both by weight (295.5 million tonnes) and value (\$32.9 billion), followed by East Asia and South East Asia (third in value, fourth in tonnage).

Table 2.3: International sea freight by region of origin and final destination, 2004–05

Region of origin/ final destination	Value		Weight		Commodity rank	
	Imports	Exports	Imports	Exports	By value	By weight
	\$ Thousand	\$ Thousand	Tonnes	Tonnes		
Africa	1 568 924	2 644 608	1 597 859	7 392 358	9	9
North & Central America	13 461 403	9 955 192	6 766 188	12 913 498	5	6
South America	1 004 653	957 253	1 024 534	8 470 863	11	8
East Asia	19 676 202	19 623 550	8 364 269	166 800 671	2	2
South East Asia	20 387 397	11 274 680	26 605 026	21 963 894	4	4
South Asia	1 173 085	3 856 886	539 424	23 764 812	8	5
Japan and North Asia	19 440 821	33 456 555	6 516 732	295 804 978	1	1
Europe	23 269 581	10 264 890	4 476 881	52 789 522	3	3
Middle East	3 137 791	4 985 988	7 694 711	10 960 493	7	7
New Zealand	4 208 842	6 737 647	2 521 861	6 098 558	6	10
Pacific Islands and Papua New Guinea	1 059 826	1 898 283	3 561 277	1 985 287	10	11
Rest of world	534 681	685 368	263 880	1 695 067	12	12
Total	108 923 206	106 340 897	69 932 642	610 640 001		

Note: An update of this table is available on the BTRE website <<http://www.btre.gov.au>>.

Source: ABS 2007.

Figure 2.1: International freight by region of origin, 2004–05



Source: ABS 2007.

Figure 2.2: International freight by region of final destination, 2004–05



Source: ABS 2007.

Table 2.4: Australia's top 20 maritime trading partners, 2004–05

Country of origin	Imports		Country of final destination	Exports		Rank
	Value	Weight		Value	Weight	
	\$ Thousand	Tonnes		\$ Thousand	Tonnes	
China (including Hong Kong and Macau)	16 549 070	5 810 833	Japan	24 199 042	226 162 656	1
Japan	15 434 420	4 742 573	China (including Hong Kong and Macau)	14 332 080	128 593 052	2
United States of America	11 616 249	4 613 520	Republic of Korea	8 998 890	69 214 836	3
Germany	6 419 797	847 816	United States of America	7 513 544	4 844 075	4
Singapore	5 785 799	7 553 395	New Zealand	6 737 647	6 098 558	5
Malaysia	4 270 140	5 445 166	Taiwan	4 562 003	36 555 711	6
New Zealand	4 208 842	2 521 861	Indonesia	3 413 319	7 690 189	7
Republic of Korea	3 940 063	1 610 250	India	2 830 017	20 452 015	8
Thailand	3 593 544	1 265 544	United Kingdom	2 780 603	12 839 821	9
Italy	3 140 422	647 798	Thailand	2 490 906	3 020 785	10
Vietnam	3 068 547	5 468 761	Singapore	2 485 191	3 331 132	11
United Kingdom	3 032 319	399 561	Malaysia	2 261 916	6 982 962	12
Indonesia	3 000 134	5 293 104	Saudi Arabia	1 802 759	2 502 462	13
Taiwan	2 663 909	1 428 001	Canada	1 674 184	2 763 539	14
France	2 000 923	298 804	Netherlands	1 539 624	9 665 523	15
Saudi Arabia	1 405 309	3 628 258	South Africa	1 469 196	4 163 175	16
Canada	1 328 337	2 024 528	Italy	1 465 470	7 852 574	17
South Africa	1 201 846	667 326	United Arab Emirates	1 090 604	2 223 594	18
Sweden	1 088 541	207 494	Papua New Guinea	1 073 128	1 147 439	19
Spain	1 071 142	233 214	France	811 285	7 578 056	20
Rest of World	14 103 861	15 224 833	Rest of world	12 809 490	46 957 840	
Total	108 923 214	69 932 640	Total	106 340 898	610 639 994	

Note: An update of this table is available on the BTRE website <<http://www.btre.gov.au>>.

Source: ABS 2007.

Trading partners by country

In 2004–05, Japan was Australia's largest trading partner for sea freight exports by value followed by China and the Republic of Korea. China has replaced Japan as Australia's largest trading partner for sea freight imports (Table 2.4). Compared with previous years, the trend of strong growth in maritime trade with China and Japan has continued. New Zealand was Australia's seventh largest supplier of imports and fifth largest market for Australia's exports, followed by Indonesia (thirteenth supplier of imports and seventh market for Australia's exports) and Papua New Guinea (nineteenth on exports).

Overseas port of loading or unloading

Not all international sea freight travels directly from the country of origin to Australia or from Australia to its final destination. As such, it is beneficial to examine the overseas port of loading or unloading. These ports represent either the last port the cargo was loaded onto a ship, prior to arriving in Australia, or the first port the cargo was unloaded from a ship, after departing Australia. An analysis of 2004–05 data on ports of loading or unloading exhibited similar patterns to previous years, with Europe being the region with the largest value of cargo loaded while South East Asia contributed the largest volume by weight (Table 2.5 and Figures 2.3 and 2.4). Japan and North Asia again dominated as the region with the highest volume and value of cargo unloaded. Compared with 2003–04, the total value of cargo loaded increased by 16.5 per cent. This was due to an increase in value from all regions, with only the rest of the world recording a decrease. The value of unloaded freight increased by 19.1 per cent compared with the previous year. There were decreases for Africa, Middle East and North and Central America while all other regions increased. The weight of cargo loaded increased by 9.0 per cent with all regions recording an increase, other than South Asia and South America. Total tonnes of cargo unloaded in Africa increased by 9.4 per cent while Europe and South America were the only regions to record a decrease.

Table 2.5: International freight by trading region of loading and unloading, 2004–05

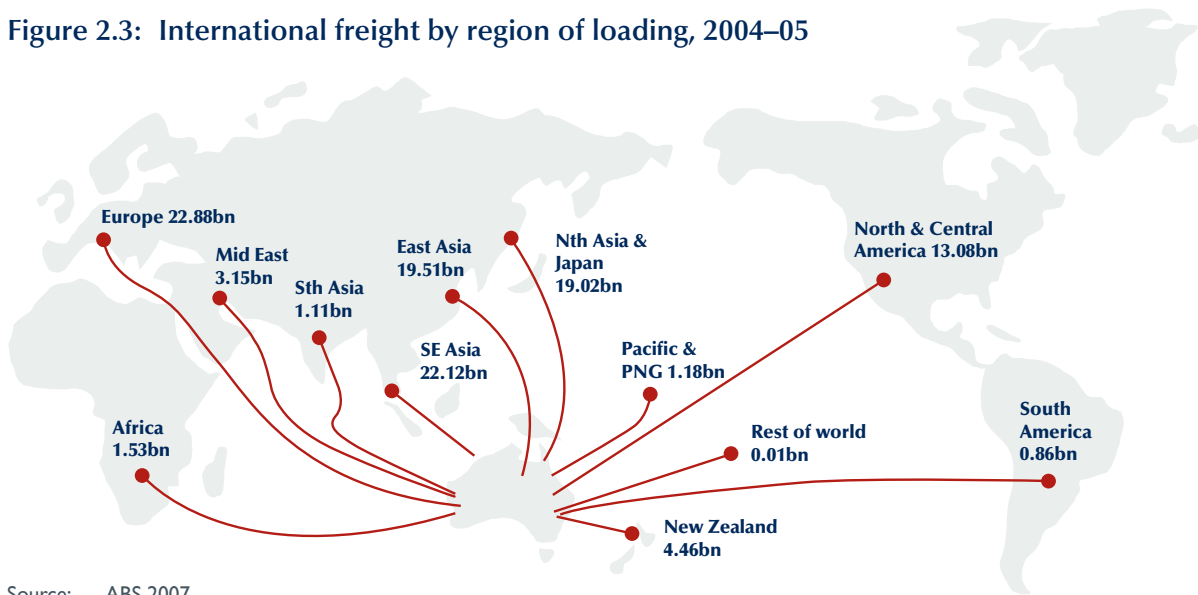
Region of loading/unloading	Value		Weight	
	Loaded	Unloaded	Loaded	Unloaded
	\$ Thousand	\$ Thousand	Tonnes	Tonnes
Africa	1 528 960	2 123 872	1 507 881	6 081 887
North and Central America	13 076 007	9 286 940	6 795 988	13 977 876
South America	864 481	822 317	949 775	8 359 891
East Asia	19 512 176	18 760 317	8 318 737	166 589 086
South East Asia	22 124 971	16 972 937	27 210 109	23 914 455
South Asia	1 113 853	3 215 303	547 242	23 234 763
Japan and North Asia	19 023 774	32 878 927	6 473 627	295 486 120
Europe	22 877 543	9 399 757	4 457 262	51 653 227
Middle East	3 149 926	3 673 549	7 598 369	11 613 993
New Zealand	4 457 938	6 837 211	2 548 624	6 120 559
Pacific Islands and Papua New Guinea	1 180 796	1 865 800	3 454 825	1 965 355
Rest of world	12 782	503 967	70 204	1 642 788
Total	108 923 207	106 340 897	69 932 643	610 640 000

Note: Freight loaded in various regions was unloaded in Australian ports. Similarly, freight unloaded in various overseas regions was loaded in Australian ports.

An update of this table is available on the BTRE website <<http://www.btre.gov.au>>.

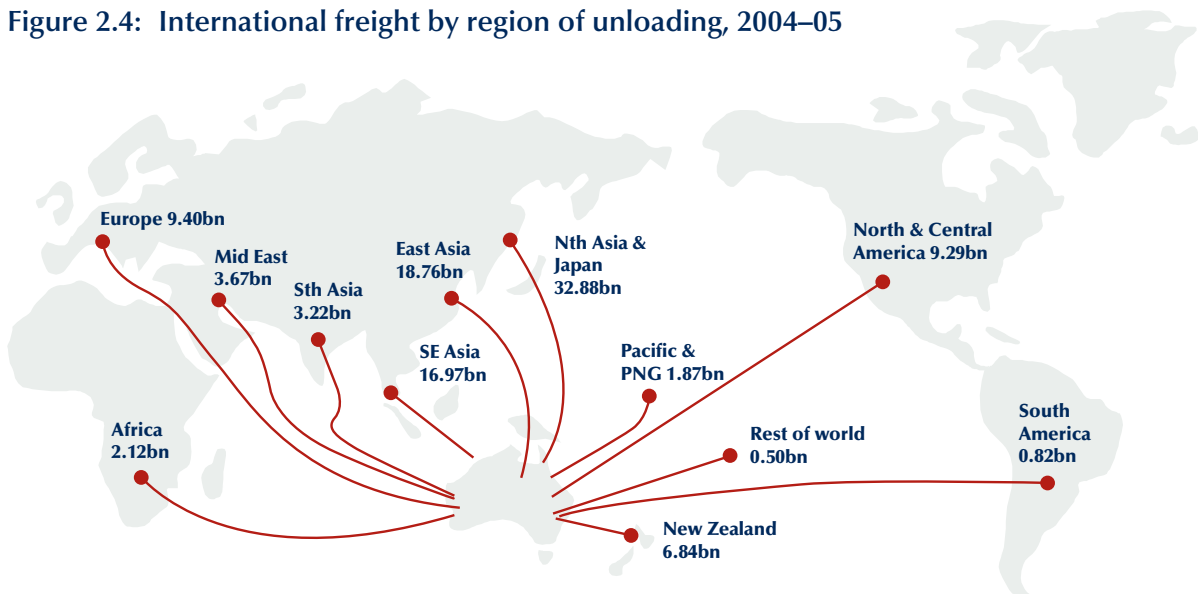
Source: ABS 2007.

Figure 2.3: International freight by region of loading, 2004–05



Source: ABS 2007.

Figure 2.4: International freight by region of unloading, 2004–05



Source: ABS 2007.

Australia's liner trade by trading region

In 2004–05, freight carried by the Australian liner trade² was valued at \$133.9 billion (Table 2.6), which is an increase of 12 per cent from 2003–04. Europe was the region with the largest value of liner cargo loaded by value, while East Asia contributed the largest volume by weight. Japan and North Asia, East Asia, and South East Asia were the largest regions of unloading liner cargo (Figures 2.5 and 2.6).

Table 2.6: International liner trade by region of loading and unloading, 2004–05

Region of loading/unloading	Value		Weight	
	Loaded \$ Thousand	Unloaded \$ Thousand	Loaded Tonnes	Unloaded Tonnes
Africa	1 237 192	657 671	391 250	374 633
North and Central America	11 222 719	5 888 837	2 266 664	1 703 025
South America	643 827	148 798	269 212	352 168
East Asia	18 320 953	7 751 965	4 750 748	5 690 721
South East Asia	10 044 891	10 717 502	3 483 798	5 397 634
South Asia	1 031 388	438 030	413 397	802 309
Japan and North Asia	17 397 967	9 425 654	2 311 733	9 758 512
Europe	21 964 853	4 764 136	4 216 791	1 970 695
Middle East	507 558	1 219 109	320 913	381 105
New Zealand	3 955 338	4 992 404	1 757 092	2 046 864
Pacific Islands and Papua New Guinea	314 572	1 247 416	131 222	626 523
Rest of world	4 558	23 258	1 826	6 246
Total	86 645 815	47 274 780	20 314 647	29 110 435

Note: Freight loaded in various regions was unloaded in Australian ports. Similarly, freight unloaded in various overseas regions was loaded in Australian ports.

An update of this table is available on the BTRE website <<http://www.btre.gov.au>>.

Source: ABS 2007.

² See explanatory notes for a definition of liner trade

Figure 2.5: International liner freight by region of loading, 2004–05



Source: ABS 2007.

Figure 2.6: International liner freight by region of unloading, 2004–05



Source: ABS 2007.

Australia's non-liner trade by trading region

Australian non-liner trade³ increased 28.4 per cent in 2004–05 and was valued at \$81.3 billion (Table 2.7). South East Asia was the most important region for non-liner cargo loaded, in terms of both value and weight. Figures 2.7 and 2.8 show Japan and North Asia was our largest non-liner unloading region for both value and weight.

Table 2.7: International non-liner trade by region of loading and unloading, 2004–05

Region of loading/unloading	Value		Weight	
	Loaded	Unloaded	Loaded	Unloaded
	\$ Thousand	\$ Thousand	Tonnes	Tonnes
Africa	291 768	1 466 201	1 116 632	5 707 254
North and Central America	1 853 287	3 398 103	4 529 414	12 274 851
South America	220 654	673 520	680 563	8 007 723
East Asia	1 191 223	11 008 352	3 567 989	160 898 365
South East Asia	12 080 080	6 255 435	23 726 309	18 517 251
South Asia	82 465	2 777 273	133 845	22 432 455
Japan and North Asia	1 625 807	23 453 273	4 161 894	285 727 608
Europe	912 690	4 635 621	239 241	49 682 532
Middle East	2 642 368	2 454 439	7 277 456	11 232 888
New Zealand	502 601	1 844 807	791 531	4 071 771
Pacific Islands and Papua New Guinea	866 224	618 384	3 323 603	1 338 832
Rest of world	8 223	480 708	68 378	1 636 542
Total	22 277 390	59 066 116	49 616 855	581 528 072

Note: Freight loaded in various regions was unloaded in Australian ports. Similarly, freight unloaded in various overseas regions was loaded in Australian ports.

An update of this table is available on the BTRE website <<http://www.btre.gov.au>>.

Source: ABS 2007.

³ See explanatory notes for a definition of non-liner trade.

Figure 2.7: International non-linear freight by region of loading, 2004–05



Source: ABS 2007.

Figure 2.8: International non-linear freight by region of unloading, 2004–05



Source: ABS 2007.

Commodity mix of Australia's international sea freight

In 2004–05, Australia's leading commodity export by value was *coal*, followed by *iron ore and concentrates*, *meat and meat preparations*, *petroleum products* and *cereals* (Table 2.8). By weight, exports of *coal* and *iron ore* dominate. The major import commodity by value was *machinery*, followed by *road vehicles*, and by weight, *petroleum oils*, *petroleum products*, *chemicals* and *fertilisers*.

Table 2.8: International freight by commodity, 2004–05

ATFCC codes and Commodity names	Value		Weight		Commodity rank	
	Exports	Imports	Exports	Imports	by value	by weight
	\$ Thousand	\$ Thousand	Tonnes	Tonnes		
0 – Food and live animals						
Cereals & cereal preparations	5 162 584	395 755	22 649 335	272 731	11	4
Coffee, tea, cocoa, spices etc.	58 757	522 292	12 700	150 948	46	50
Dairy products & birds' eggs	2 301 842	339 098	858 929	93 163	21	32
Feeding stuff for animals	803 061	269 704	1 875 336	438 585	36	18
Fish, crustaceans, molluscs etc.	658 882	905 754	43 062	210 430	33	48
Live animals	671 555	1 020	376 187	353	42	46
Meat & meat preparations	6 604 660	372 721	1 547 237	97 606	9	24
Miscellaneous edible products & preparations	665 850	1 289 675	236 664	276 546	26	38
Sugars, sugar preparations & honey	191 716	170 441	626 990	84 693	55	37
Vegetables & fruit	1 099 211	1 046 696	1 136 455	738 847	25	20
1 – Beverages and tobacco						
Ale, beer & stout, cider (alcoholic)	24 063	102 312	28 530	120 095	62	51
Non-alcoholic beverages nes	26 316	115 869	26 188	92 571	61	54
Spirits (potable), alcoholic beverages nes	61 300	396 808	24 491	92 888	52	55
Tobacco & tobacco manufactured	92 253	171 237	8 425	17 759	57	61
Wine & vermouth	2 707 825	196 325	1 115 430	44 685	20	27
2 – Crude materials, inedible, except fuels						
Aluminium ores & concentrates; alumina	4 406 822	10 813	19 189 720	17 424	13	5
Copper ores & concentrates	1 694 659	9 956	1 391 046	4 873	31	26
Cork & wood	1 041 957	616 842	11 712 679	577 769	32	8
Cotton	763 690	661	411 017	290	40	44
Crude animal & vegetable materials nes	221 021	162 408	63 164	74 192	54	53
Crude minerals	462 417	123 929	16 045 807	1 349 864	45	7
Crude rubber (including synthetic)	10 739	145 346	5 835	76 428	59	57
Fertilisers, crude	3 232	54 524	4 300	782 776	63	35
Hides, skins & furskins, raw	101 013	229 696	680 707	382 130	56	30
Iron ore & concentrates	530 749	1 721	332 193	631	50	47
Lead & zinc ores & concentrates	8 080 313	145 014	242 997 009	4 647 386	7	1
Mineral sands	1 334 998	53 792	2 515 213	112 347	34	16

Table 2.8: International freight by commodity, 2004–05 (continued)

ATFCC codes and Commodity names	Value		Weight		Commodity rank	
	Exports	Imports	Exports	Imports	by value	by weight
	\$ Thousand	\$ Thousand	Tonnes	Tonnes		
2 – Crude materials, inedible, except fuels (continued)						
Oil seeds & oleaginous fruits	175 501	5 121	829 015	817	58	33
Other metallic ores & metal scrap	498 618	60 739	1 268 335	134 785	48	25
Other textile fibres	3 005 156	63 335	6 014 250	250 085	18	11
Pulp & waste paper	43 897	103 765	40 393	60 066	60	56
Uranium & thorium ores & concentrates	475 109	0	11 946	0	51	63
Wool, sheep & lambs	2 476 684	47 063	446 438	10 569	23	39
3 – Mineral fuels, lubricants & related materials						
Coal, coke & briquettes	17 238 436	18 102	232 975 116	115 994	3	2
Gases, natural & manufactured nes	287	195	69	58	65	64
Liquefied natural gas	3 225 156	0	0	0	17	65
Liquefied petroleum gas (LPG)	807 298	144 524	1 586 856	276 832	37	21
Petroleum oil	5 792 095	10 413 358	11 207 215	22 975 135	4	3
Petroleum oils & refined prods	1 330 682	4 526 060	2 534 839	8 064 674	10	9
4 – Animal & vegetable oils, fats & waxes						
Oils & fats	326 653	368 949	509 474	279 014	41	34
5 – Chemical & related products nes						
Chemicals	2 571 401	4 488 955	1 204 817	5 206 147	8	10
Fertilisers, manufactured	171 667	1 067 839	526 091	3 972 314	35	12
Organic chemicals	98 688	1 799 193	75 924	891 652	29	31
Plastics	454 204	2 141 427	227 916	902 473	22	29
6 – Manufactured goods classified chiefly by material						
Aluminium & aluminium alloys	4 103 408	542 906	1 635 678	142 885	12	23
Copper & copper alloys	1 710 174	219 765	406 057	37 962	27	40
Cork & wood manufactures (excludes furniture)	238 755	634 839	402 270	353 629	39	36
Iron & steel	723 007	3 108 295	734 421	2 931 725	15	13
Lead & lead alloys	549 583	8 979	410 812	6 089	49	43
Leather, leather manufactures nes	482 838	103 959	137 629	6 420	44	52
Manufactures of metal nes	668 608	3 197 193	258 635	901 294	14	28
Nickel & nickel alloys	540 268	29 104	27 998	1 529	47	60
Non-metallic mineral manufacture nes	348 171	1 545 623	511 455	2 853 756	30	14
Other non-ferrous metals nes	315 334	91 160	59 279	10 866	53	59
Paper, paperboard & articles	729 887	2 521 876	915 847	1 937 487	16	15
Rubber manufactures nes	138 450	1 765 835	32 018	411 907	28	41

Table 2.8: International freight by commodity, 2004–05 (continued)

ATFCC codes and Commodity names	Value		Weight		Commodity rank	
	Exports	Imports	Exports	Imports	by value	by weight
	\$ Thousand	\$ Thousand	Tonnes	Tonnes		
6 – Manufactured goods classified chiefly by material (continued)						
Textile yarn, fabrics, & articles	3 18 936	2 056 539	41 943	379 229	24	42
Zinc & zinc alloys	623 622	8 042	404 025	3 452	43	45
7 – Machinery & transport equipment						
Machinery	3 710 007	25 477 041	338 123	2 168 158	1	17
Road vehicles & transport equipment	4 136 640	20 048 632	335 685	1 511 040	2	22
8 – Miscellaneous manufactured articles						
Apparel & clothing access	121 099	2 840 761	13 229	226 037	19	49
Footwear	26 379	893 744	1 595	71 044	38	58
Miscellaneous manufactured articles	1 539 739	8 887 626	165 569	1 711 277	5	19
9 – Commodities & transactions nes						
Confidential	6 825 112	1 824 730	18 429 921	360 705	6	6
Miscellaneous	17 863	17 526	4 467	7 526	64	62
Total	106 340 897	108 923 209	610 639 999	69 932 642		

Note: An update of this table is available on the BTRE website <<http://www.btre.gov.au>>.

Source: ABS 2007.

Chapter 3: Coastal freight

In 2004–05, 107.1 million tonnes of coastal cargo was handled through Australian ports. Of this, 53.7 million tonnes of coastal cargo was loaded and 53.4 million tonnes was unloaded.

Based on cargo loaded, the Australian coastal fleet task was 114 billion tonne-kilometres. This is down on the previous year, with a slight increase in bauxite/alumina offset by large decreases in crude oil and petroleum products.

Commodity mix of Australia's coastal sea freight

In 2004–05, there were increases in tonnage loaded in *crude materials, inedible, except fuel* while *mineral fuels, lubricants and related materials* experienced a decrease (Table 3.1). The overall tonne-kilometres task was down on 2003–04 results (Table 3.2).

Table 3.1: Coastal freight loaded by commodity group, 10 years to 2004–05

Commodity group	Financial year									
	1995–96	1996–97	1997–98	1998–99	1999–00	2000–01	2001–02	2002–03	2003–04	2004–05
	Million tonnes									
0 – Food and live animals	1.5	1.2	1.5	1.5	1.9	1.6	1.7	2.1	1.6	1.7
1 – Beverages and tobacco	0.1	0.1	0.1	0.1	0.1	0.1	0.2	0.1	0.1	0.2
2 – Crude materials, inedible, except fuels	23.2	23.8	24.0	23.7	24.7	23.7	25.5	24.7	24.9	27.7
3 – Mineral fuels, lubricants & related materials	17.1	18.2	20.8	15.8	16.2	18.0	15.9	15.9	16.2	13.8
4 – Animal and vegetable oils, fats and waxes	0.0	0.0	0.0	0.1	0.2	0.1	0.1	0.0	0.1	0.0
5 – Chemicals and related materials, nes	0.7	0.5	0.7	0.8	1.1	1.0	1.6	1.9	1.5	1.5
6 – Manufactured goods classified chiefly by material	3.9	4.0	4.2	4.8	5.6	6.0	5.6	5.8	5.9	6.1
7 – Machinery and transport materials	0.1	0.1	0.1	0.1	0.1	0.2	0.2	0.3	0.3	0.4
8 – Miscellaneous manufactured articles	0.6	0.4	0.6	0.5	0.6	0.6	0.7	0.7	0.7	0.7
9 – Commodities and transactions nes	0.6	0.8	0.6	1.0	0.7	0.7	0.9	1.4	1.5	1.6
Total	47.8	49.1	52.5	48.4	51.3	52.0	52.4	52.8	53.0	53.7

Source: BTRE 2007.

Table 3.2: Coastal freight task by commodity group, 10 years to 2004–05

Commodity group	Financial year									
	1995–96	1996–97	1997–98	1998–99	1999–00	2000–01	2001–02	2002–03	2003–04	2004–05
	Billion tonne-kilometres									
0 – Food & live animals	2.2	2.1	2.2	2.2	2.8	2.4	2.7	4.1	2.8	2.4
1 – Beverages & tobacco	0.1	0.1	0.1	0.1	0.2	0.2	0.3	0.3	0.3	0.2
2 – Crude materials, inedible, except fuels	67.9	68.2	71.5	70.5	65.9	61.8	62.1	63.4	64.8	69.7
3 – Mineral fuels, lubricants & related materials	29.2	35.9	36.1	28.6	30.2	30.0	33.6	34.5	37.4	30.5
4 – Animal & vegetable oils, fats & waxes	0.0	0.1	0.1	0.1	0.4	0.1	0.1	0.0	0.1	0.1
5 – Chemicals & related materials, nes	0.9	0.7	1.1	1.0	1.7	2.0	3.1	4.0	3.1	3.1
6 – Manufactured goods classified chiefly by material	4.6	4.8	4.9	5.1	6.7	6.8	6.4	6.6	6.6	6.1
7 – Machinery & transport materials	0.1	0.1	0.1	0.1	0.1	0.2	0.2	0.3	0.3	0.4
8 – Miscellaneous manufactured articles	0.3	0.2	0.3	0.3	0.4	0.5	0.5	0.5	0.6	0.5
9 – Commodities & transactions nes	0.7	0.5	0.5	0.7	0.5	0.6	1.5	1.0	0.9	0.9
Total	106.1	112.6	116.9	108.8	108.9	104.5	110.4	114.8	117.0	114.0

Source: BTRE 2007.

In 2004–05, total tonnages for all commodity classifications, as a whole, changed only slightly over 2003–04 figures (Table 3.3). One of the most significant changes was in the commodity group *crude materials inedible except fuels*, which increased markedly due to the Queensland intrastate bauxite movements. At the same time, total *mineral fuels, lubricants and related materials* were down on previous years due to the lower levels of crude oil movements, particularly around Western Australia. However, most categories showed very little change from their 2003–04 level.

Table 3.3: Coastal freight by Australian state and territory of loading and unloading and commodity group, 2004–05

State/territory of origin	State/territory of destination							Total
	NSW	VIC	QLD	SA	WA	TAS	NT	
<i>Thousand tonnes</i>								
0 – Food & live animals								
NSW	0	21	27	49	25	5	1	129
VIC	4	0	42	7	50	360	0	463
QLD	184	320	24	0	40	0	0	569
SA	0	22	0	0	0	7	0	29
WA	2	17	5	5	13	0	1	44
TAS	60	353	3	0	6	4	0	425
NT	0	0	0	0	0	0	0	0
Sub total	250	732	101	61	135	377	3	1 659
1 – Beverages & tobacco								
NSW	0	1	5	1	16	0	0	24
VIC	2	0	6	1	5	64	0	77
QLD	0	0	0	0	2	0	23	25
SA	0	0	0	0	0	0	0	0
WA	0	0	0	0	0	0	0	0
TAS	8	18	0	0	0	0	0	26
NT	0	0	0	0	0	0	0	0
Sub total	10	19	11	2	23	64	23	152
2 – Crude materials inedible except fuels								
NSW	0	138	7	17	11	70	0	242
VIC	4	0	18	15	31	171	0	239
QLD	1 329	309	11 138	104	11	448	1	13 340
SA	2 065	479	229	2 223	0	196	0	5 191
WA	4 355	1 088	63	0	53	6	3	5 568
TAS	1 386	353	40	201	0	164	0	2 144
NT	92	0	0	0	0	626	286	1 004
Sub total	9 231	2 367	11 494	2 560	106	1 681	289	27 728
3 – Mineral fuels, lubricants & related materials								
NSW	74	97	300	1 070	5	81	0	1 628
VIC	2 214	46	312	68	248	737	0	3 623
QLD	542	32	1 537	0	138	0	0	2 249
SA	147	298	0	0	56	43	4	547
WA	1 112	743	719	763	2 374	0	29	5 741
TAS	0	1	0	0	0	0	0	1
NT	0	0	0	0	0	0	26	26
Sub total	4 089	1 218	2 868	1 901	2 821	861	59	13 816

Table 3.3: Coastal freight by Australian state and territory of loading and unloading and commodity group, 2004–05 (continued)

State/territory of origin	State/territory of destination							Total
	NSW	VIC	QLD	SA	WA	TAS	NT	
<i>Thousand tonnes</i>								
4 – Animal & vegetable oils, fats & waxes								
NSW	0	0	3	2	0	0	0	5
VIC	0	2	3	0	1	8	0	14
QLD	0	2	2	2	1	5	0	12
SA	0	0	0	0	0	0	0	0
WA	0	1	1	0	0	0	0	1
TAS	0	1	0	0	0	0	0	1
NT	0	0	0	0	0	0	0	0
Sub total	0	5	9	4	2	13	0	34
5 – Chemicals & related materials nes								
NSW	76	3	36	0	22	9	0	146
VIC	8	1	23	30	46	132	0	239
QLD	65	303	55	233	2	33	0	691
SA	21	0	0	10	31	0	0	61
WA	4	6	0	0	10	0	1	22
TAS	64	221	37	38	0	14	0	374
NT	0	0	0	0	1	0	7	8
Sub total	238	533	150	311	111	188	8	1 540
6 – Manufactured goods classified chiefly by material								
NSW	5	959	153	22	99	20	4	1 262
VIC	4	0	85	9	107	261	0	466
QLD	119	0	1 244	0	4	24	2	1 393
SA	0	449	276	0	1	0	0	725
WA	10	15	0	9	16	0	1	53
TAS	748	1 299	11	6	6	0	12	2 083
NT	0	0	0	0	23	0	79	102
Sub total	887	2 723	1 769	46	256	305	99	6 084
7 – Machinery & transport materials								
NSW	1	6	13	0	12	3	2	38
VIC	3	13	14	10	26	86	0	151
QLD	1	0	0	0	15	0	1	17
SA	0	6	0	0	0	0	0	6
WA	1	1	1	0	4	0	2	10
TAS	16	128	0	0	0	0	0	144
NT	0	0	0	0	1	0	0	1
Sub total	22	154	29	10	58	89	5	367

Table 3.3: Coastal freight by Australian state and territory of loading and unloading and commodity group, 2004–05 (continued)

State/territory of origin	State/territory of destination							Total
	NSW	VIC	QLD	SA	WA	TAS	NT	
Thousand tonnes								
8 – Miscellaneous manufactured articles								
NSW	1	6	11	0	5	2	0	25
VIC	3	0	11	6	32	634	0	686
QLD	0	0	0	0	4	0	1	5
SA	0	0	0	0	0	0	0	0
WA	3	5	0	0	1	0	0	9
TAS	0	5	0	0	0	0	0	5
NT	0	0	0	0	0	0	0	0
Sub total	8	16	22	6	41	635	2	732
9 – Commodities & transactions nes								
NSW	0	2	12	0	2	1	1	20
VIC	3	0	22	20	20	157	0	221
QLD	0	0	42	0	2	0	2	47
SA	0	0	0	0	19	0	0	19
WA	2	2	0	2	4	7	1	18
TAS	22	1 149	0	4	0	8	0	1 183
NT	0	0	0	0	1	0	50	52
Sub total	27	1 154	77	26	49	173	55	1 561
Total	14 762	8 921	16 530	4 928	3 603	4 384	543	53 672

Source: BTRE 2007.

Cargo flows

Table 3.4 details coastal freight flows between the States by weight. Queensland and Western Australia are ranked first and second in terms of state of origin. Queensland and New South Wales are ranked first and second in terms of state of destination. This is the same as the previous two years. Queensland's top ranking as state of origin is due to the large tonnages of intrastate bauxite trade.

Table 3.4: Total coastal freight flows, 2004–05

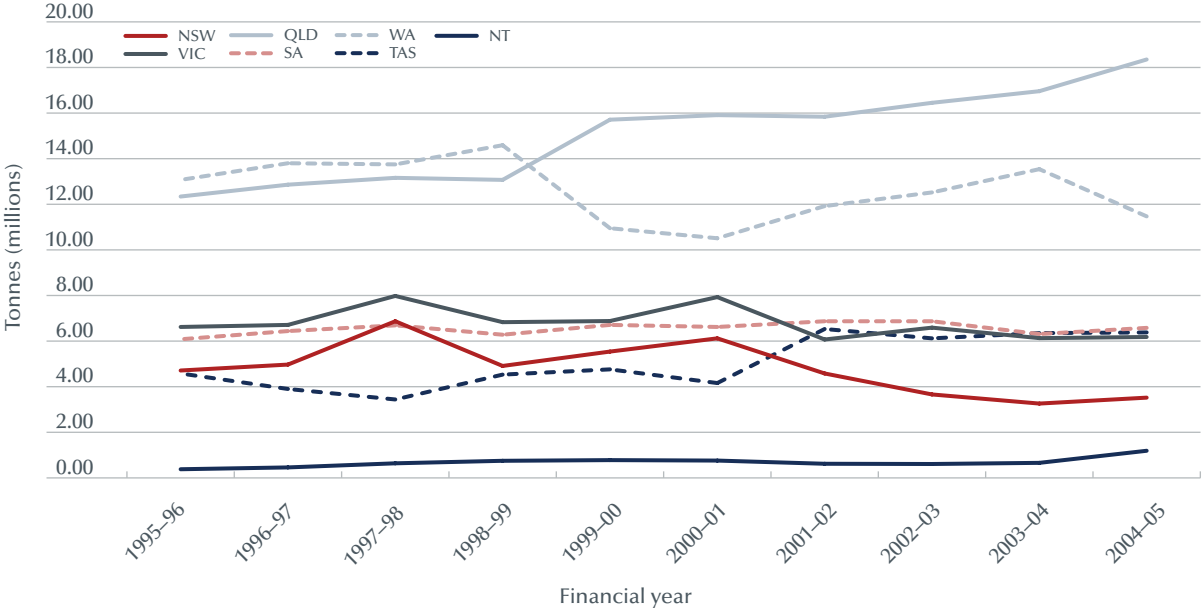
State/territory of origin	State/territory of destination							Total	Per cent of total
	NSW	VIC	QLD	SA	WA	TAS	NT		
	Thousand tonnes								
NSW	158	1 235	567	1 162	196	192	9	3 520	7
VIC	2 244	62	536	165	567	2 607	0	6 181	12
QLD	2 241	965	14 043	340	219	511	31	18 350	34
SA	2 233	1 253	504	2 232	107	245	4	6 579	12
WA	5 490	1 879	789	780	2 475	13	39	11 465	21
TAS	2 304	3 527	90	249	12	190	12	6 385	12
NT	92	0	0	0	26	626	448	1 193	2
Total	14 762	8 921	16 530	4 928	3 603	4 384	543	53 672	100
Per cent of total	28	17	31	9	7	8	1	100	

Source: BTRE 2007.

Shipping freight activity over the last 10 years by state and territory is shown in Figures 3.1 and 3.2. Changes since 2003–04 include:

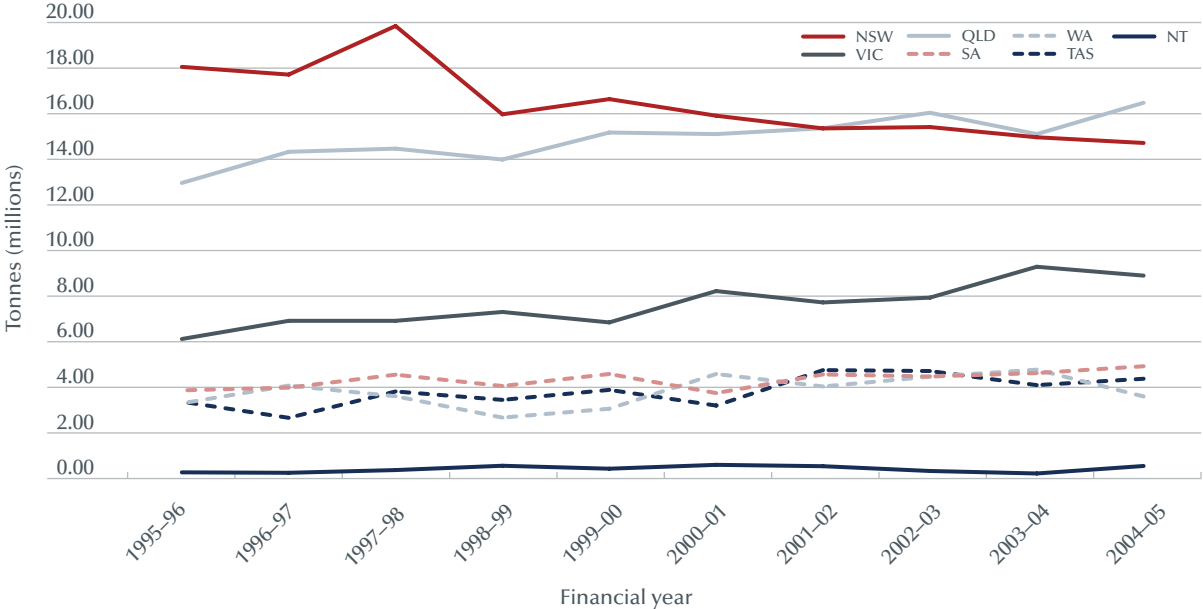
- increasing tonnages loaded in all States and Territories, except Western Australia; and
- slight declines in tonnages unloaded in New South Wales, Victoria and Western Australia balanced by increases in Queensland, South Australia, Tasmania and the Northern Territory.

Figure 3.1: Coastal freight loaded by Australian state and territory, 10 years to 2004–05



Source: BTRE 2007.

Figure 3.2: Coastal freight unloaded by Australian state and territory, 10 years to 2004–05



Source: BTRE 2007.

Table 3.5: Coastal freight flows between Australian ports, 2004–05

Port of origin	Port of destination											Total			
	Sydney	Rest of NSW	Melbourne	Rest of VIC	Brisbane	Rest of QLD	Adelaide	Rest of SA	Fremantle	Rest of WA	Hobart		Rest of TAS	Darwin	Rest of NT
	Thousand tonnes														
Sydney	0	9	32	85	328	65	4	0	190	0	0	42	1	0	756
Rest of NSW	13	135	143	974	40	136	18	1 140	3	3	47	103	6	3	2 764
Melbourne	64	0	0	29	224	1	81	0	324	0	1	1 902	0	0	2 627
Rest of VIC	2 179	1	33	0	241	70	76	7	83	160	460	245	0	0	3 555
Brisbane	509	6	79	31	0	1 536	10	0	39	23	0	5	25	5	2 268
Rest of QLD	184	1 543	627	229	971	11 535	116	213	158	0	154	351	1	0	16 082
Adelaide	0	42	460	66	276	0	0	0	51	0	0	0	0	0	895
Rest of SA	485	1 706	666	61	229	0	2 049	183	56	0	122	123	4	0	5 684
Fremantle	93	0	220	614	2	0	760	15	10	768	0	8	36	1	2 526
Rest of WA	1 082	4 315	48	997	755	33	0	5	1 697	0	5	0	2	0	8 939
Hobart	0	68	43	172	37	0	35	157	0	0	0	0	0	0	513
Rest of TAS	802	1 434	3 311	1	14	40	9	47	12	0	164	26	12	0	5 872
Darwin	0	0	0	0	0	0	0	0	7	19	0	0	257	161	445
Rest of NT	0	92	0	0	0	0	0	0	0	0	0	626	29	1	748
Total	5 411	9 350	5 662	3 259	3 116	13 415	3 161	1 768	2 630	973	952	3 432	373	170	53 672

Source: BTRE 2007.

Table 3.5 shows the changes in trading patterns in more detail, providing information on cargo flows between the various state capitals and rest of state regions. In comparing the tonnages moved in 2004–05 with 2003–04:

- past increases in tonnage movement from the rest of Western Australia to the rest of Victoria had slowed (7.3 per cent decline), partially due to the general downturn in crude oil movements;
- there has been a marked increase in shipments between the rest of Tasmania and Melbourne (882,000 tonnes, or 36.3 per cent growth), with a corresponding decline between the rest of Tasmania and the rest of Victoria (787 000 tonnes or 100 per cent, although this may be simply due to volatility in the data); and
- there was a marked general decline in the trade from and to Fremantle (17.1 and 16.2 per cent respectively).

Pack type

An analysis of pack type⁴ shows that bulk cargo⁵ (see Tables 3.6 and 3.7) continues to be the majority of coastal cargo, representing 86.0 per cent by weight of total coastal cargo, although this is slightly down from 2003–04. Liquid bulk cargo loaded in 2004–05 has decreased significantly to 12.6 million tonnes compared to levels in the previous year. Non-bulk cargo has nearly doubled since 1993–94 with 3.7 million tonnes loaded in 1993–94 to 7.7 million tonnes loaded in 2004–05. Most of this growth has been in containerised cargo.

Data in Table 3.8 illustrates the flow of cargo between the states by pack type. Of significance is the overall decrease in the 2004–05 levels of containerised cargo, offset by increases in non-bulk cargo, particularly between New South Wales and Victoria.

⁴ See explanatory notes for a definition of pack type

⁵ See explanatory note for a definition of bulk cargo.

Table 3.6: Coastal freight loaded by port and pack type, 2004–05

Port of loading	Pack type				Total	Per cent of total
	Dry bulk	Liquid bulk	Container non bulk	Other non-bulk		
	Thousand tonnes					
Sydney	0	396	349	11	756	1.4
Rest of NSW	1 466	76	26	1 197	2 764	5.1
Melbourne	21	62	1 848	696	2 627	4.9
Rest of VIC	28	3 520	1	5	3 555	6.6
Brisbane	133	2 048	67	20	2 268	4.2
Rest of QLD	15 780	168	15	119	16 082	30.0
Adelaide	832	36	21	6	895	1.7
Rest of SA	5 210	474	0	0	5 684	10.6
Fremantle	613	1 795	104	13	2 526	4.7
Rest of WA	4 960	3 961	3	15	8 939	16.7
Hobart	509	4	0	0	513	1.0
Rest of TAS	2 790	1	2 132	949	5 872	10.9
Darwin	285	23	11	126	445	0.8
Rest of NT	742	0	0	6	748	1.4
Total	33 368	12 563	4 578	3 163	53 672	100.0
Per cent of total	62.2	23.4	8.5	5.9	100.0	

Source: BTRE 2007.

Table 3.7: Coastal freight unloaded by port and pack type, 2004–05

Port of unloading	Pack type				Total	Per cent of total
	Dry bulk	Liquid bulk	Container non bulk	Other non-bulk		
	Thousand tonnes					
Sydney	1 474	3 901	58	4	5 437	10.2
Rest of NSW	9 106	155	14	99	9 374	17.6
Melbourne	2 011	798	1 594	732	5 135	9.6
Rest of VIC	1 401	899	45	953	3 298	6.2
Brisbane	1 478	1 311	209	5	3 003	5.6
Rest of QLD	11 503	2 049	28	18	13 597	25.5
Adelaide	2 206	872	45	16	3 139	5.9
Rest of SA	1 826	32	0	0	1 858	3.5
Fremantle	243	1 749	718	40	2 750	5.2
Rest of WA	13	453	31	17	513	1.0
Hobart	938	1	0	0	938	1.8
Rest of TAS	1 239	421	1 904	616	4 181	7.8
Darwin	25	42	38	59	164	0.3
Total	33 464	12 681	4 683	2 559	53 386	100.0
Per cent of total	62.7	23.8	8.8	4.8	100.0	

Source: BTRE 2007.

Table 3.8: Coastal freight by Australian state and territory of loading and unloading and pack type, 2004–05

State/territory of loading	State/territory of unloading							Total
	NSW	VIC	QLD	SA	WA	TAS	NT	
<i>Thousand tonnes</i>								
Dry Bulk								
NSW	3	167	15	1 135	0	145	0	1 466
VIC	1	0	0	27	0	21	0	49
QLD	1 674	866	12 378	336	158	500	0	15 912
SA	2 086	949	504	2 232	26	245	0	6 042
WA	4 345	1 103	67	5	48	5	0	5 574
TAS	1 927	881	76	240	0	175	0	3 299
NT	92	0	0	0	20	626	288	1 026
Sub total	10 127	3 966	13 041	3 976	251	1 717	288	33 368
Liquid Bulk								
NSW	83	86	296	0	3	5	0	471
VIC	2 214	48	312	68	243	698	0	3 582
QLD	506	98	1 596	2	9	5	0	2 216
SA	147	298	0	0	60	0	4	509
WA	1 111	744	720	763	2 389	0	29	5 756
TAS	4	1	0	0	0	0	0	5
NT	0	0	0	0	0	0	23	23
Sub total	4 065	1 273	2 923	833	2 705	708	56	12 563
Container								
NSW	2	30	112	6	183	38	4	375
VIC	28	0	218	48	291	1 265	0	1 850
QLD	1	0	15	1	38	0	26	82
SA	0	0	0	0	21	0	0	21
WA	23	31	1	11	27	8	5	107
TAS	304	1 797	3	3	12	14	0	2 132
NT	0	0	0	0	1	0	10	11
Sub total	358	1 859	348	70	573	1 325	44	4 578
Other								
NSW	70	952	146	21	10	4	5	1 208
VIC	2	14	6	22	34	623	0	701
QLD	60	2	53	0	14	5	5	139
SA	0	6	0	0	0	0	0	6
WA	11	0	1	0	11	0	4	28
TAS	69	848	11	6	0	2	12	949
NT	0	0	0	0	5	0	127	132
Sub total	211	1 823	218	49	74	634	154	3 163
Total	14 762	8 921	16 530	4 928	3 603	4 384	543	53 672

Source: BTRE 2007.

Tasmanian trade

The trade to and from Tasmania (Table 3.9) changed slightly in 2004–05 from 2003–04:

- by an increase of 0.5 per cent from 6.35 million tonnes to 6.38 million tonnes from Tasmania to the mainland;
- by a decrease of 0.4 per cent from 5.3 million tonnes to 5.1 million tonnes from the mainland to Tasmania.

There was a 15 per cent increase in the weight of *crude materials, inedible, except fuels* unloaded in Tasmania between 2003–04 and 2004–05 as well as a 53 per cent increase in *miscellaneous manufactured articles*. *Commodities and transactions nes* experienced a 30 per cent decrease between 2003–04 and 2004–05.

Table 3.9: Tasmanian coastal freight by commodity group, 2003–04 and 2004–05

Commodity group	Loaded		Unloaded	
	2003–04	2004–05	2003–04	2004–05
	<i>Thousand tonnes</i>			
0 – Food and live animals	431.2	425.1	267.7	240.6
1 – Beverages and tobacco	19.8	26.3	91.1	93.9
2 – Crude materials, inedible, except fuels	2 060.7	2 143.5	1 467.8	1 687.4
3 – Mineral fuels, lubricants and related materials	3.3	0.9	896.9	975.3
4 – Animal and vegetable oils, fats and waxes	0.7	0.7	2.8	0.0
5 – Chemicals and related materials, nes	373.5	374.3	160.4	143.8
6 – Manufactured goods classified chiefly by material	2 116.7	2 082.5	392.8	432.3
7 – Machinery and transport materials	152.3	143.5	203.5	206.4
8 – Miscellaneous manufactured articles	6.0	5.2	42.9	65.4
9 – Commodities and transactions nes	1 187.6	1 182.7	1 821.0	1 274.0
Total	6 351.9	6 384.7	5 346.8	5 119.1

Source: BTRE 2007.

Chapter 4: Coastal voyage permits

In 2004–05, 1 869 voyages were undertaken by foreign-flagged ships using voyage permits⁶ to move cargo around the Australian coast. Of these, 892 voyages used SVPs and 977 voyages used CVPs (Table 4.1). Total tonnes carried using SVPs and CVPs increased by 7.1 per cent from the previous year.

Table 4.1: Number of voyages, tonnes and TEUs carried under coastal voyage permits, 2004–05

Permit type	Voyages	Freight carried	TEUs carried
	Number	Tonnes	Number
Single voyage permit	892	11 030 905	5 855
Continuing voyage permit	977	2 015 719	56 938
Total	1 869	13 046 624	62 793

Source: DOTARS 2007.

Compared to 2003–04, the use of single voyage permits to transport bauxite and alumina continued to increase with a 123 per cent increase in total tonnes. There was also a large increase in the number of CVPs used to transport containers (TEUs) of petroleum products. The number of permits used to transport crude oil and iron ore decreased by 41 per cent, compared with 2003–04.

The proportion of total coastal freight, by weight, moved using voyage permits increased slightly from 22.9 per cent in 2003–04 to 24.3 per cent in 2004–05. The tonne-kilometres task under coastal permits, as a per cent of total coastal tonne-kilometres, decreased from 31.0 per cent in 2003–04 to 26.8 per cent in 2004–05 (Table 4.2). In theory, the use of voyage permits is more economical on longer coastal routes than on the shorter routes where road and rail are more competitive.

In 2004–05, the use of voyage permits by the iron ore industry accounted for 31.5 per cent of both tonnes loaded and by tonne-kilometres. This was down significantly compared to 2003–04, in which voyage permits were used to carry 56.5 per cent by tonnes loaded and 53.1 per cent by tonne-kilometres. Voyage permits utilised by the bauxite/alumina industry, in comparison, accounted for only 6.5 per cent of total tonnes and total tonne-kilometres.

While previous editions of *Australian Sea Freight* contained information regarding voyage permits by pack type, this information is no longer available and the relevant table has been discontinued.

⁶ Voyage permit information provided in this paper differs from that appearing in the BTRE's *Waterline* series. See Explanatory notes for further information.

Table 4.2: Impact of voyage permits on coastal trade, 2004–05

<i>Cargo group</i>	<i>Total coastal</i>	<i>SVP and CVP</i>	<i>SVP and CVP as per cent of coastal tonnes</i>	<i>Total coastal</i>	<i>SVP and CVP (estimate)</i>	<i>SVP and CVP as per cent of coastal tonne- kilometres</i>
	<i>Million tonnes</i>		<i>Per cent</i>	<i>Billion tonne-kilometres</i>		<i>Per cent</i>
Iron ore	6.9	2.2	31.5	27.8	8.8	31.5
Bauxite Alumina	13.6	0.9	6.5	30	2	6.5
Crude oil	6.4	1.9	29.1	19	5.5	29.1
Petroleum products	5.8	1.2	20.7	8.2	1.7	20.7
Other	21	9.1	43.3	29	12.6	43.3
Total	53.7	13	24.3	114	30.5	26.8

Source: DOTARS 2007.

Chapter 5: Australian port activity

In 2004–05, there was an 8.3 per cent increase in the number of voyages into Australia from overseas ports while the total number of port calls increased by 8.2 per cent. The number of ships visiting Australian ports increased by 8.3 per cent compared to the previous year. Melbourne was the busiest port based on the number of ship visits (3 435 visits), while Brisbane was the busiest, based on a count of first port of call of international voyages (1 050 visits).

Table 5.1: Ship activity at Australian ports, 2004–05

<i>State/territory</i>	<i>Australian port</i>	<i>All ships involved in international shipping</i>	<i>All ships involved in coastal and international shipping</i>	<i>Voyages by all ships involved in international shipping</i>	<i>Port calls by all ships involved in coastal and international shipping</i>
<i>Number</i>					
New South Wales	Eden	8	11	12	15
	Newcastle	459	686	848	1 577
	Port Kembla	166	320	191	676
	Sydney	261	615	733	2 480
	Yamba	2	2	6	9
Victoria	Geelong	136	262	167	499
	Hastings	14	58	24	219
	Melbourne	241	664	662	3 436
	Point Wilson		1		1
	Portland	60	140	98	271
Queensland	Abbot Point	18	21	21	24
	Brisbane	463	748	1 050	2 240
	Bundaberg	7	17	7	23
	Cairns	29	70	35	176
	Cape Flattery	9	9	15	20
	Gladstone	466	652	627	1 311
	Hay Point	638	708	881	1 104
	Hayman Island		1		1
	Karumba	17	23	19	47
	Lucinda	16	21	16	23
	Mackay	44	92	51	151
	Mourilyan	15	20	16	24
	Port Alma	17	30	21	35
	Port Douglas		1		2
	Thursday Island	8	9	9	10
Townsville	200	286	323	574	
Weipa	89	102	92	162	
Whitsunday Island		3		3	

Table 5.1: Ship activity at Australian ports, 2004–05 (continued)

<i>State/territory</i>	<i>Australian port</i>	<i>All ships involved in international shipping</i>	<i>All ships involved in coastal and international shipping</i>	<i>Voyages by all ships involved in international shipping</i>	<i>Port calls by all ships involved in coastal and international shipping</i>
<i>Number</i>					
South Australia	Adelaide	78	385	84	803
	Ardrossan		16		20
	Klein Point		1		2
	Port Bonython	8	22	8	26
	Port Giles	5	25	5	27
	Port Lincoln	17	84	18	100
	Port Pirie	5	38	5	68
	Rapid Bay		1		1
	Thevenard	8	38	8	82
	Wallaroo	12	28	12	30
	Whyalla	23	49	25	92
	Unidentified South Australian ports	2	2	2	2
Western Australia	Albany	51	67	56	77
	Barrow Island Terminal	4	14	4	64
	Broome	8	18	10	27
	Buffalo Terminal		1		1
	Bunbury	182	258	220	334
	Cape Cuvier	3	3	3	3
	Challis Terminal	2	3	2	3
	Cossack Pioneer Terminal	5	23	6	70
	Dampier	421	537	704	1 830
	Esperance	85	135	91	149
	Exmouth		3		3
	Fremantle	542	764	900	1 582
	Geraldton	116	193	153	266
	Griffin Terminal	3	9	3	14
	Jabiru Terminal	2	4	2	4
	Legendre Terminal		1		2
	Lowendal Island		1		1
	Onslow	4	4	4	4
	Port Hedland	425	459	797	983
	Port Walcott	195	202	288	306
Shark Bay	2	2	3	3	
Stag Terminal	2	11	3	45	
Useless Loop	5	5	5	5	

Table 5.1: Ship activity at Australian ports, 2004–05 (continued)

State/territory	Australian port	All ships involved in international shipping	All ships involved in coastal and international shipping	Voyages by all ships involved in international shipping	Port calls by all ships involved in coastal and international shipping
Western Australia (continued)	Varanus Island Terminal	1	11	1	108
	Wandoo Terminal	1	7	1	23
	Woollybutt Terminal	4	12	4	16
	Wyndham	1	5	1	5
	Yampi Sound	2	2	2	2
	Unidentified Western Australian ports		1		1
Tasmania	Burnie	20	68	21	471
	Devonport	2	40	2	968
	Grassy		1		2
	Hobart	41	110	53	231
	Launceston	76	162	111	467
	Margate		1		1
	Port Latta	12	37	12	44
	Triabunna	1	1	1	1
Northern Territory	Bayu-Undan Field	9	11	16	18
	Bing Bong	6	11	7	13
	Darwin	97	150	250	735
	Elang-Kakatua Field	2	3	2	3
	Gove	93	119	106	158
	Laminaria-Corallina Terminal	3	10	3	13
	Milner Bay	64	70	74	82
Other ports – not clearly specified	Unidentified Australian ports	20	25	21	29
	Macquarie Island	1	1	1	2
Total		3 540	3 661	10 034	25 535

Note: An update of this table is available on the BTRE website <<http://www.btre.gov.au>>.

Source: LMIU 2007.

In 2004–05, the busiest ports in terms of tonnes of cargo handled and their primary export commodities in order, were Port Hedland (iron ore); Dampier (iron ore); Hay Point (coal); Newcastle (coal); Gladstone (coal); Port Walcott (iron ore); Melbourne (miscellaneous manufactures); Fremantle (wheat); Brisbane (refined oil and gas); Sydney (miscellaneous manufactures); and Port Kembla (coal) (Table 5.2).

Table 5.2: Cargo loaded and unloaded by Australian ports, 2004–05

State/territory	Australian port	Coastal		International		Total	Rank
		Loaded	Unloaded	Exports	Imports		
Tonnes							
New South Wales	Coffs Harbour	0	0	13	481	494	83
	Eden	1 081	192			1 273	82
	Lord Howe Island	85	3 154			3 239	77
	Newcastle	282 787	1 752 611	80 791 051	1 192 136	84 018 585	4
	Port Kembla	2 476 420	7 617 626	12 165 272	2 274 655	24 533 973	11
	Sydney	756 054	5 436 895	4 380 957	14 175 665	24 749 571	10
	Twofold Bay			995 713	637	996 350	41
	Yamba/Grafton	3 638	262	1 380	1	5 281	75
	Other ports			4 469	232	4 701	76
Victoria	Geelong	1 567 593	1 497 163	2 591 551	5 850 210	11 506 517	14
	Melbourne	2 626 506	5 134 907	9 180 872	11 039 330	27 981 615	7
	Port Welshpool	4 783	9 953			14 736	73
	Portland	4 024	804 984	2 436 917	414 989	3 660 914	25
	Westernport	1 978 214	985 540	475 046	37 073	3 475 873	26
	Other ports			114 531		114 531	63
Queensland	Abbot Point			12 281 859		12 281 859	13
	Brisbane	2 268 144	3 003 198	9 233 114	10 911 307	25 415 763	9
	Bundaberg	130 997	29 409	243 926	5 716	410 048	55
	Cairns	65 382	531 470	829 802	361 598	1 788 252	35
	Gladstone	3 538 038	11 689 176	46 203 889	1 639 205	63 070 308	5
	Hay Point			84 815 221		84 815 221	3
	Innisfail			622 986		622 986	50
	Karumba	225 283	6 145	730 329	11	961 768	42
	Lucinda			676 853		676 853	48
	Mackay	322 072	487 905	2 681 805	239 171	3 730 953	24
	Mourilyan	23 761				23 761	71
	Rockhampton			7 879	16	7 895	74
	Thursday Island			2 062	965	3 027	78
	Townsville	750 331	851 386	4 302 854	4 445 940	10 350 512	16
	Weipa	11 025 653	2 008	4 408 291	65 217	15 501 169	12
	Other ports			811 721		811 721	46
South Australia	Adelaide	894 728	3 138 923	3 642 557	2 008 231	9 684 438	17
	Ardrossan	545 136				545 136	52
	Klein Point	2 049 272				2 049 272	32
	Port Bonython	469 514		533 616		1 003 130	40
	Port Giles			126 369		126 369	62
	Port Lincoln	11 124	99 236	1 439 657	166 340	1 716 356	36

Table 5.2: Cargo loaded and unloaded by Australian ports, 2004–05 (continued)

State/territory	Australian port	Coastal		International		Total	Rank
		Loaded	Unloaded	Exports	Imports		
Tonnes							
South Australia (continued)	Port Pirie	121 772	445 211	306 170	12 026	885 179	44
	Thevenard	1 141 642		455 626		1 597 268	37
	Wallaroo	9 647	54 016	578 665	34 330	676 659	49
	Whyalla	1 335 942	1 259 513	1 049 117	107 213	3 751 785	23
	Other ports			295 023		295 023	57
Western Australia	Albany	10 096		2 784 376	148 780	2 943 252	28
	Barrow Island	386 991				386 991	56
	Broome	509 578	5 180	49 182	7 221	571 161	51
	Bunbury	400 437		9 192 138	1 153 728	10 746 303	15
	Cape Cuvier	211 176		2 623 428		2 834 604	29
	Carnarvon			286	28	314	84
	Challis Venture	27 580				27 580	70
	Christmas Island	44 472	5 933			50 405	67
	Cocos Island	315	2 415			2 730	79
	Cossack Pioneer	955 893				955 893	43
	Dampier	785 692		103 244 592	522 975	104 553 259	2
	Derby				95	95	85
	Esperance	15 649	206 862	7 381 189	191 500	7 795 200	18
	Fremantle	2 525 846	2 749 870	11 689 319	9 200 396	26 165 430	8
	Geraldton	2 089	196 131	5 223 603	156 805	5 578 628	21
	Griffin Venture	268 519				268 519	58
	Jabiru Venture	79 865				79 865	64
	Modec Venture	55 386				55 386	66
	Northern Endeavour	45 140				45 140	68
	Onslow	20 321				20 321	72
	Port Hedland	4 292 838	80 971	103 570 688	449 006	108 393 503	1
	Port Walcott			56 443 065	25 323	56 468 388	6
	Thevenard Island	152 307				152 307	60
Useless Loop			813 055		813 055	45	
Varanus Island	498 880				498 880	53	
Withnall Bay	164 576				164 576	59	
Wyndham	11 505	15 404	1 071 933	82 523	1 181 364	39	
Yampi Sound			416 738		416 738	54	
Other ports			2 203 675		2 203 675	30	
Tasmania	Burnie	1 530 138	968 022	1 411 426	134 491	4 044 077	22
	Devonport	1 868 838	1 270 601	5 229	50 212	3 194 880	27

Table 5.2: Cargo loaded and unloaded by Australian ports, 2004–05 (continued)

State/territory	Australian port	Coastal		International		Total	Rank
		Loaded	Unloaded	Exports	Imports		
Tonnes							
Tasmania (continued)	Hobart	512 863	938 493	486 820	170 005	2 108 181	31
	King Island	26 480	34 897			61 377	65
	Launceston	1 121 329	1 907 099	3 355 767	576 205	6 960 400	19
	Port Latta	1 325 000		701 253		2 026 253	33
	Spring Bay			791 126	0	791 126	47
	Stanley			138 533		138 533	61
	Other ports			44 882		44 882	69
Northern Territory	Communities	1 311				1 311	81
	Confidential ports			5 303 358	966 043	6 269 401	20
	Darwin	444 793	163 595	228 328	1 113 469	1 950 185	34
	Gove	2 259				2 259	80
	Other ports ^a	744 183		481 883		1 226 066	38
Other ports			1 566 963	1 141	1 568 104	n/a	
Total		53 671 970	53 386 354	610 639 998	69 932 641	787 630 962	

a Other ports in NT consists of Bing Bong, remote communities, Groote Eylandt and rigs, which are not split up easily.

Note: ABS records offshore exports such as crude oil through the nearest mainland port, although the actual cargo does not pass through the actual port. For example, most of the 1.1 million tonnes of exports through Wyndham, in Western Australia, are actually exported from offshore crude oil terminals.

Sources: BTRE 2007, ABS 2007

Chapter 6: Australian merchant fleet

In 2004–05, the Australian merchant fleet increased in terms of deadweight and gross tonnage, with the larger ships engaged primarily in the international trade, although overall, the fleet decreased from 82 ships in 2003–04 to 79 in 2004–05. Thirty-two vessels left the fleet, while 29 other ships joined during 2004–05 (Table 6.1).

The number of small ships (mostly general cargo carriers) declined from 30 to 2 in 2004–05. This decline was accompanied by a marked increase in larger ships (mostly bulk carriers) from 52 to 77. The expansion in the large bulk carrier fleet followed an increased demand in Australia for dry bulk tonnage, necessary to supply the increased export demand for minerals and energy commodities in 2004–05.

Table 6.1: Summary of the Australian trading fleet, 2004–05

Trade		Vessels	Deadweight tonnage	Gross registered tonnage
		Number	Tonnes	Tonnes
<i>Major Trading Fleet (>2000 dwt)</i>				
Coastal	Australian registered	33	977 458	739 409
	Overseas registered	14	483 887	311 700
	Total coastal	47	1 461 345	1 051 109
Overseas	Australian registered	7	573 308	597 036
	Overseas registered	23	766 025	463 044
	Total overseas	30	1 339 333	1 060 080
Total major trading fleet		77	2 800 678	2 111 189
<i>Other trading ships (>150 Gross registered tonnage but less than 2000 dwt)</i>				
Australian registered		0	0	0
Overseas registered		2	2 156	2 209
Total other trading ships		2	2 156	2 209
Total Australian registered		40	1 550 766	1 336 445
Total overseas registered		39	1 252 068	776 953
Total Australian trading fleet		79	2 802 834	2 113 398

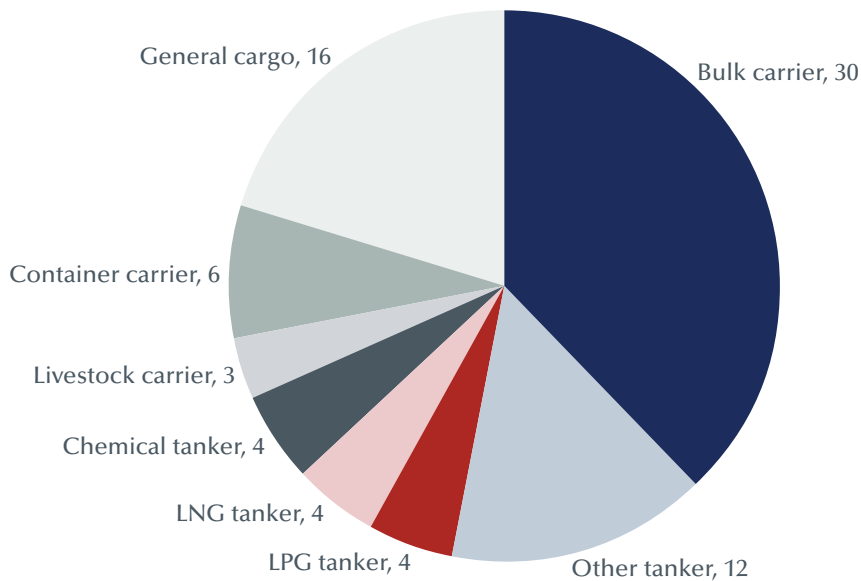
Note: This table shows the number of ships operated by Australian companies for at least part of the financial year. In addition, to these, there were 18 ships managed by Australian-registered companies, which operated internationally without calling to Australian ports in 2004–05. Five of this group were registered in Australia. The majority of ships in this group (11 ships) were multipurpose and general cargo vessels.

Sources: DOTARS—personal communications; LMIU 2007; Fairplay 2005; AMSA 2005, Shipping, companies (various)—personal communications.

The composition of the fleet, by ship type, is illustrated in Figure 6.1. Changes from 2003–04 to 2004–05 to note include:

- a doubling of the number of LPG and LNG tankers, from 4 to 8;
- an increase in the number of bulk carriers, from 22 to 30; and
- a slight fall in the number of general cargo ships, from 18 to 16.

Figure 6.1: Number of ships by ship type, 2004–05



Sources: DOTARS—personal communications; LMIU 2007; Fairplay 2005; AMSA 2005, Shipping, companies (various)—personal communications.

Tables 6.2 and 6.3 show the main trades and commodities in which the major trading vessels were engaged during 2004–05.

Table 6.2: Ships in the major overseas trading fleet, 2004–05

<i>Name of vessel</i>	<i>Trade</i>	<i>Products</i>	<i>Ports called at in Australia</i>	<i>Overseas countries visited</i>
<i>Bulk carriers</i>				
Alltrans	(c)	Alumina	Gladstone, Launceston, Newcastle	New Zealand
Endeavour		Dry cargo	Gladstone, Botany Bay, Weipa,	Papua New Guinea, Singapore, People's Republic of China, New Caledonia, Taiwan
Iron Kembla	(c)	Iron ore, coal	Port Kembla, Hay Point, Port Hedland	Republic of Korea, Singapore
Pacific Triangle	(c)	Iron ore, coal	Port Kembla, Port Hedland, Newcastle	Japan, Singapore
Saraji Trader		Coal, dry bulk	Hay Point	Japan, Egypt, Brazil, Gibraltar, Italy, Philippines, Singapore
Western Star		Dry bulk	Townsville	Papua New Guinea
Western Triumph		Dry bulk		Papua New Guinea
Western Zenith		Dry bulk	Townsville	Papua New Guinea
CSL Pacific	(c)	Dry bulk	Adelaide, Brisbane, Geelong, Gladstone, Melbourne, Thevenard	People's Republic of China, New Caledonia
<i>Chemical tankers</i>				
Botany Tradewind		Chemicals	Adelaide, Brisbane, Fremantle, Sydney	Argentina, Brazil, New Zealand, Malaysia, Singapore
Juniper		Chemicals	Fremantle, Adelaide, Esperance, Port Lincoln, Melbourne	New Zealand, Singapore, Taiwan
Petro Navigator		Chemicals	Cairns	Papua New Guinea, Solomon Islands
<i>Container carriers</i>				
ANL Progress	(c)	General	Botany Bay, Melbourne, Sydney	New Zealand, Seychelles, Sri Lanka, Tanzania, Kenya
Farid F.	(c)	General	Fremantle, Portland	Indonesia, Malaysia, People's Republic of China, Philippines, Singapore
<i>General cargo ships</i>				
Bosavi		General	Townsville	Papua New Guinea
Norfolk Guardian	(c)	General	Brisbane, Yamba, Sydney	New Zealand, Norfolk Island, New Caledonia
NT Express		General	Darwin, Karumba	Indonesia, Papua New Guinea, Philippines, Brunei
Western Flyer		General	Brisbane, Newcastle, Townsville, Thursday Is.	Papua New Guinea, Philippines,
<i>Livestock carriers</i>				
Danny F.II		Livestock	Fremantle	United Arab Emirates, Jordan, Singapore, Yemeni Republic
Molunat		Livestock	Darwin, Karumba	Indonesia, Papua New Guinea, Philippines, Brunei
Rodolfo Mata		Livestock	Fremantle	Indonesia, Jordan, Malaysia
<i>LNG Tankers</i>				
Northwest Sanderling		LNG	Dampier	Japan
Northwest Sandpiper		LNG	Dampier	Japan, Singapore
Northwest Snipe		LNG	Dampier	Japan
Northwest Stormpetrel		LNG	Dampier	Japan, Singapore

Table 6.2: Ships in the major overseas trading fleet, 2004–05 (continued)

<i>Name of vessel</i>	<i>Trade</i>	<i>Products</i>	<i>Ports called at in Australia</i>	<i>Overseas countries visited</i>
<i>LPG Tankers</i>				
Boral Gas	(c)	LPG	Hastings, Brisbane, Devonport	New Zealand, Papua New Guinea, Tonga, Vanuatu, Western Samoa
Hebe		LPG	Hastings, Botany Bay	New Zealand, French Polynesia, Tonga, Cook Islands
Pacific Gas		LPG	Cairns	New Zealand, Papua New Guinea, Tonga, Solomon Islands, Vanuatu, Western Samoa, Chile
<i>Tankers</i>				
Jacaranda		Crude oil	Newcastle	Canada, Japan, United States of America, France, Indonesia, Panama
Nivosa	(c)	Crude oil	Sydney, Geelong	Singapore, Malaysia, Vietnam, Saudi Arabia, Mozambique
Pacific Venture		Crude oil	Melbourne	Japan, People's Republic of China, Singapore, Sudan, Thailand, Vietnam
Samar Spirit	(c)	Crude oil	Botany Bay, Hastings, Brisbane	Papua New Guinea, Philippines

Note: (c) denotes that the vessel occasionally transports coastal freight.

Source: LMIU 2007; Shipping companies (various)—personal communications

Table 6.3: Ships in the major coastal trading fleet, 2004–05

<i>Name of vessel</i>	<i>Trade</i>	<i>Products</i>	<i>Ports called at in Australia</i>	<i>Overseas countries visited</i>
<i>Bulk carriers</i>				
Aburri		Metal concentrates	Bing Bong	
Accolade II		Limestone	Adelaide, Klein Port	
Cementco	(o)	Cement, lead concentrates	Gladstone, Melbourne, Brisbane, Port Kembla, Townsville	
Endeavour River		Bauxite, alumina	Gladstone, Weipa, Thursday Island, Newcastle	
Enterprise		Bulk carrier	Hobart, Geelong, Melbourne, Portland, Thevenard, Port Pirie, Brisbane	Panama
Fitzroy River		Bauxite, alumina	Gladstone, Thursday Island, Weipa, Sydney, Newcastle	
Goliath		Cement	Devonport, Melbourne, Sydney, Newcastle	
Goonyella Trader		Coal, dry cargo	Hay Point	Japan, Egypt, Brazil, Gibraltar, Italy, Philippines, Singapore
Hakula	(o)	Coal, dry bulk	Newcastle, Launceston, Adelaide, Sydney, Hobart, Port Kembla	New Zealand
Ikuna	(o)	Coal, dry bulk	Port Kembla, Sydney, Adelaide, Newcastle	New Zealand
Iron Sturt		Cement, metal concentrates, alumina, zinc	Burnie, Hobart, Geelong, Port Pirie, Portland, Adelaide, Melbourne	
Iron Yandi	(o)	Iron ore, coal	Port Hedland, Port Kembla, Newcastle	Japan, Republic of Korea, Taiwan, Singapore
Kowulka		Gypsum, salt, sugar, alumina, chemicals	Sydney, Thevenard, Melbourne, Brisbane	New Zealand
Lindesay Clark		Alumina, dolomite, fertilizers, steel products	Geelong, Fremantle, Bunbury, Ardrossan, Whyalla	Singapore
Ormiston		Gypsum, salt, sugar	Melbourne, Thevenard, Ardrossan, Bundaberg, Mackay, Whyalla	
Pioneer	(o)	Sugar	Mackay, Sydney	Gibraltar, Singapore, Republic of Korea, Egypt,
Portland		Alumina, steel products	Portland, Fremantle, Bunbury, Geelong	
River Boyne		Bauxite,	Gladstone, Weipa, Thursday Island	
River Embley		Bauxite,	Gladstone, Weipa, Thursday Island	
Stadacona		Coal, dry bulk	Adelaide, Melbourne, Thevenard, Port Kembla, Brisbane	
Wunma		Dry bulk	Karumba	Singapore
<i>Chemical tankers</i>				
Stolt Australia	(o)	Chemicals	Melbourne, Hobart, Townsville, Botany Bay, Gladstone	
<i>Container carriers</i>				
ANL Australia	(o)	General	Botany Bay, Brisbane, Melbourne, Sydney,	Japan, People's Republic of China, Republic of Korea, Taiwan
ANL Bass Trader		General	Melbourne, Launceston, Burnie, Hobart	
ANL Emblem	(o)	General	Botany Bay, Brisbane, Melbourne, Fremantle	Singapore
ANL Explorer	(o)	General	Botany Bay, Brisbane, Melbourne, Sydney,	Japan, People's Republic of China, Republic of Korea, Taiwan

Table 6.3: Ships in the major coastal trading fleet, 2004–05 (continued)

<i>Name of vessel</i>	<i>Trade</i>	<i>Products</i>	<i>Ports called at in Australia</i>	<i>Overseas countries visited</i>
<i>General cargo ships</i>				
Claudia		Blue metal	Sydney	Japan, Peru
Cotswold Prince		General cargo	Albany	
Iron Monarch		Steel products	Hastings, Port Kembla	
Newcastle Bay		General cargo	Cairns, Weipa	
Searoad Mersey		General cargo	Devonport, Melbourne, Sydney, Newcastle	
Searoad Tamar		General cargo	Devonport, Melbourne	
Spirit of Tasmania I		General cargo, passengers	Devonport, Melbourne, Sydney, Hastings	
Spirit of Tasmania II		General cargo, passengers	Devonport, Melbourne, Sydney, Hastings	
Spirit of Tasmania III		General cargo, passengers	Devonport, Melbourne, Sydney, Hastings	
Tasmanian Achiever		General cargo	Burnie, Melbourne, Launceston, Hastings	
Trinity Bay		General cargo, passengers	Cairns	
Victorian Reliance		General cargo	Melbourne, Burnie, Sydney	
<i>LPG tankers</i>				
Helen		LPG	Botany Bay, Brisbane, Hastings	Tonga, New Zealand
<i>Tankers</i>				
Barrington	(o)	Petroleum products	Botany Bay, Cairns, Gladstone, Mackay, Brisbane, Townsville	Singapore
Broadwater	(o)	Crude oil	Botany Bay, Hastings, Port Bonython, Brisbane,	Indonesia, Papua New Guinea, Singapore
Helix	(o)	Petroleum products	Geelong, Devonport, Hobart, Sydney, Launceston	Singapore
Japonica	(o)	Petroleum products	Fremantle, Broome, Esperance	Singapore, New Zealand
Palmerston	(o)	Petroleum products	Mackay, Gladstone, Townsville, Brisbane,	Singapore
Scottish Bard		Petroleum products	Adelaide, Botany Bay, Fremantle, Melbourne	Singapore, People's Republic of China
Scottish Wizard	(o)	Petroleum products	Adelaide, Fremantle	Singapore, Papua New Guinea
Seakap	(o)	Bitumen & bituminous materials, chemicals	Newcastle, Port Kembla, Portland, Whyalla, Gladstone	Taiwan

Note: (o) denotes that the vessel occasionally enters the overseas trade market.

Sources: LMIU 2007; Shipping companies (various)—personal communications.

Explanatory notes

Permits

Part VI of the Navigation Act 1912 requires vessels trading interstate on the Australian coast to be licensed or have a permit. Some trades have an exemption under the Navigation Act, mostly concerning the external territories, but there is also an exemption for cruise liners to carry passengers, except between Victoria and Tasmania.

An unlicensed ship may be granted a permit to trade on the Australian coast in the carriage of either cargo or passengers, where:

- there is no suitable licensed ship available for the shipping task; or
- the service carried out by licensed ships is inadequate; and
- it is considered to be desirable in the public interest that an unlicensed ship be allowed to undertake that shipping task.

Two kinds of permits are issued:

- a single voyage permit (SVP) is issued for a single voyage between designated ports for the carriage of a specified cargo or passengers; and
- a continuing voyage permit (CVP) is issued for a period of up to three months (up to December 2002 a CVP could be issued up to six months) and enables a vessel to carry specified cargo between nominated ports for that period.

The information provided in this paper on voyage permits differs from that appearing in the BTRE's *Waterline* series. Figures in *Waterline* report tonnes as specified on the permits when issued, while in this paper the figures reported are in actual tonnes and TEUs, as notified by the permit holders after they have used the permit. In addition, *Waterline* reports on numbers of permits issued within a given period, whereas this paper reports on cargo carried subject to the actual CVP or SVP sail date where it falls within that period.

Sources

Coastal tonnage figures and pack details have been derived from data supplied by port authorities.

To obtain tonne-kilometre figures, a port-to-port distance figure (including pilotage) was applied to individual port tonnages. Where optional routes within Australia could reasonably be used, the shorter distance has been used. The main reference for distances was *The Ports of Australia* (Australian Chamber of Shipping 1993).

The vessel movement details for the Australian trading fleet have been obtained from Lloyd's Marine Information Unit, *Lloyd's Ship Movements*, unpublished, and, from data supplied by shipping companies and from BTRE's knowledge of the shipping industry.

International sea cargo data was obtained from ABS, *International Cargo Statistics*, unpublished.

Glossary

ABS:	Australian Bureau of Statistics.
Australian trading fleet:	Cargo vessels operated by Australian companies to and from Australia, with Australian crews and/or vessels licensed to operate on the Australian coast (meaning they can trade between states and the Northern Territory), and vessels operating intrastate. The fleet includes vessels that carry cargo and passengers, but does not include vessels that carry passengers only.
ATFCC:	See Australian Transport Freight Commodity Code Classification.
Australian Transport Freight Commodity Code Classification:	A systematic classification of commodities transported by sea, air, road, rail and pipeline, developed jointly by precursors of the Department of Transport and Regional Services and the Australian Bureau of Statistics. It has been designed to facilitate standardised classification of goods carried by these modes to, from and within Australia. The ATFCC is aligned with the Standard International Trade Classification (SITC) at divisional (2-digit) level of classification.
BTRE:	Bureau of Transport and Regional Economics.
Bulk cargo:	The best description of bulk cargo is cargo that can be poured or dropped, as a liquid or solid, into a ship's hold. Non-bulk is effectively those types of cargo that would be damaged if dropped or poured. For example: <ul style="list-style-type: none"> wheat as a bulk cargo is loaded as loose grain, via a conveyor belt to a spout, where it is poured into a hold; wheat as a non bulk cargo is bagged or in containers. In either of these forms, it has to be lifted into the ship's hold. If it was poured into the hold, as in the bulk case, the bags or containers would break.
Continuing voyage permit:	Allows international foreign flag vessels to trade on the Australian coast, in the coasting trade over predetermined set route for a set period for a predetermined amount of cargo. This may include several coastal voyages. CVP's are used in the general cargo (containerised or not) and bulk trades.
CVP:	See continuing voyage permit.
DOTARS:	Department of Transport and Regional Services.
Deadweight tonnage:	The measure of weight that a vessel can carry, including cargo, bunkers, water and stores. Expressed in tonnes, it is the difference between the displacement of the vessel loaded to its summer loadline and the light ship displacement, or the total weight of the vessel.
DWT:	See deadweight tonnage.
Freight:	Includes all cargo lifted, including empty containers, but excludes ship stores and bunkers.
Gross registered tonnage:	The measure of the internal capacity of a ship that is available within the hull and enclosed spaces above deck, for cargo, stores, passengers and crew (with certain exceptions). GRT is expressed as a volume, in cubic metres divided by 2.83.
GRT:	See gross registered tonnage.

Liner:	A liner service is a fleet of ships, with a common ownership or management, which provide a fixed service, at regular intervals, between named ports, and offer transport to any goods in the catchment area served by those ports and ready for transit by their sailing dates. A fixed itinerary, inclusion of regular service, and obligation to accept cargo from all comers and to sail, whether filled or not, on the date fixed by a published schedule is what distinguishes the liner trade from the tramp trade. It includes most containerised, ro-ro and general cargo freight shipping services.
LMIU:	Lloyd's Marine Information Unit.
Major trading fleet:	Vessels of 2000 DWT or more.
Minor trading fleet:	Vessels of 150 GRT or more but less than 2000 DWT.
NES:	Not elsewhere stated.
Non-liner:	Non-liner cargo consists of all dry and liquid bulk cargo, but also comprises cargo not shipped on regular liner services such as charters, dedicated car carriers and passenger ships.
NZ:	New Zealand.
Pack type:	Pack type is a description of the way cargo is packaged and moved. Pack type is primarily split between bulk and non-bulk. Bulk cargo is further subdivided, between liquid and dry bulk, which is a characteristic of the cargo. Gas is considered as liquid bulk cargo for the purposes of this report since it is pumped on board like most liquid bulk cargoes. Non-bulk cargo is similarly split between containerised, and other not classified and/or non-containerised cargo.
PNG:	Papua New Guinea.
SE:	South East.
Single voyage permit:	Allows international foreign flag vessels to trade on the Australian coast in the coasting trade over a set route (once only per permit) for a predetermined amount of cargo.
SVP:	See single voyage permit.
TEU:	See twenty foot equivalent unit.
Tonne:	All figures are measured in mass tonnes (1000 kilograms) unless otherwise stated.
Tonne-kilometres:	The product of tonnes of freight carried between two ports and the sea route distance in kilometres, including pilotage, between the two ports.
Tramp:	A ship, which will call at any port to carry whatever cargoes are available, normally based on a charter or part charter (Brodie, 1997).
Transhipped cargo:	Recorded for both inbound and outbound to the port of transshipment and assigned to Australian Transport Freight Commodity Code Classification (ATFCC), Division 93.
Twenty foot equivalent:	measure used to count containers. A 40 foot container unit counts as 2 TEUs.

Statistical issues

Coastal statistics provided by port authorities on tonnages loaded and unloaded do not always balance. The most common reasons for this lack of consistency are:

- Port authorities record cargo as having been unloaded during the month the vessel arrives in port, and, cargo loaded against the month of the vessel's departure. Consequently, variations in the loaded and unloaded cargo totals will occur due to cargo being in transit during the financial year cut off period.
- A port authority's record of cargo loaded and unloaded is based on information provided by the ship's agents. This information could be incorrect because the agent may provide only summary statistics for different types of cargo. The agent may also not know the true origin or destination of particular consignments, and may therefore record the last or next port of call respectively. This particularly applies to liquid and dry bulk commodities, where the cargo originates from or is destined for, several ports.
- The commodity recorded by the agent may not be classified in the same way at the ports of loading and unloading. For example, gypsum loaded in South Australia is classified as fertiliser at NSW ports, and petroleum products are classified as kerosene in Cairns.

The BTRE has endeavoured to reconcile some of the above data problems as far as possible. It takes no responsibility for correctness or accuracy. Reconciliation was not attempted for many of the smaller shipments.

Figures in tables may not add to totals due to rounding.

References

AMSA — See Australian Maritime Safety Authority

ABS — See Australian Bureau of Statistics

DOTARS — See Department of Transport and Regional Services

BTRE — See Bureau of Transport and Regional Economics

LMIU — See Lloyd's Marine Information Unit

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