



BIMCO



MANPOWER REPORT

The global supply and demand for seafarers in 2015



Executive Summary



EXECUTIVE SUMMARY

The Manpower Report is a comprehensive update on the global manpower situation in the shipping industry prepared by BIMCO and ICS.

The report aims to provide an estimate of:

- The balance between the global supply of qualified and competent seafarers available for service on ships trading internationally, and the industry's demand for seafarers to operate the world merchant fleet;
- Details about the composition of the supply of seafarers that operates the world merchant fleet, including their nationalities, rank/role, age profiles and gender; and
- The anticipated future growth of the world merchant fleet over the next ten years and its possible impacts on the global manpower situation.



Methodology

The 2015 report follows the methodology utilised for previous BIMCO and ICS reports, however some changes have been effected to take into account feedback from the 2010 report and to ensure that it remains a comprehensive source of information on maritime manpower.

Views and opinions from a wider range of stakeholders have been solicited and the number of ship types covered has been expanded to offer specific information for different sectors.

Estimated supply of seafarers

The global supply of seafarers in 2015 is estimated at 1,647,500 seafarers, of which 774,000 are officers and 873,500 are ratings.

The global supply of seafarers has increased over the past five years, with both numbers of qualified officers and ratings available to the internationally trading world merchant fleet continuing to increase. The number of officers was reported to have increased by 34% between 2005 and 2010, and is now estimated to have increased by 24% in the past five years. The following figure provides a summary of how the estimated global supply of seafarers has increased since 2005.

Summary of the estimated global supply of seafarers 2005-2015

RANK	2005	2010	2015
Officers	466,000	624,000	774,000
Ratings	721,000	747,000	873,500
Total	1,187,000	1,371,000	1,647,500

*Note: The estimates for 2015 are not directly comparable to previous report due to changes in approaches to data collection and definitions used in the scope of the report. Source: Country Questionnaire, 2015, and Manpower Reports from 2005 and 2010.

Based on the estimates of national contributions to the current global supply of seafarers, the five countries with the largest numbers of seafarers in 2015 are shown below.

Estimated five largest seafarer supply countries

	FOR ALL SEAFARERS	FOR OFFICERS	FOR RATINGS
1	China	China	Philippines
2	Philippines	Philippines	China
3	Indonesia	India	Indonesia
4	Russian Federation	Indonesia	Russian Federation
5	Ukraine	Russian Federation	Ukraine

*Source: Country Questionnaire, 2015

The top five countries indicated by companies were China, the Philippines and the Russian Federation, followed by Ukraine and then India. This closely resembles the countries estimated to supply the largest number of seafarers, with the exception of Indonesia.

RANK	TOP FIVE SEAFARER SUPPLY COUNTRIES REPORTED BY COMPANIES
1	China
1	Philippines
1	Russian Federation
4	Ukraine
5	India

*Source: Company Questionnaire, 2015

Estimated demand for seafarers

The world merchant fleet for the purposes of the 2015 report was defined as 68,723 ships. The largest category was general cargo ships with 31% of the total ships by number, followed by bulk carriers with 16% and offshore supply vessels with 10%. The 2015 report has included information on the tanker industry and various types of offshore vessels to obtain an indication of the demand for seafarers by these sectors.

The global demand for seafarers in 2015 is estimated at 1,545,000 seafarers, with the industry requiring approximately 790,500 officers and 754,500 ratings.

The estimated demand for officers has increased by around 24.1% since 2010, while the demand for ratings has increased by around 1.0%. The estimated demand for officers and ratings in 2015 compared to the estimates of demand reported in previous reports is shown below.

Estimated global demand for seafarers 2005-2015

RANK	2005	2010	2015
Officers	476,000	637,000	790,500
Ratings	586,000	747,000	754,500
Total	1,062,000	1,384,000	1,545,000

*Source: 2015 estimates and data from Manpower Reports from 2005 and 2010.

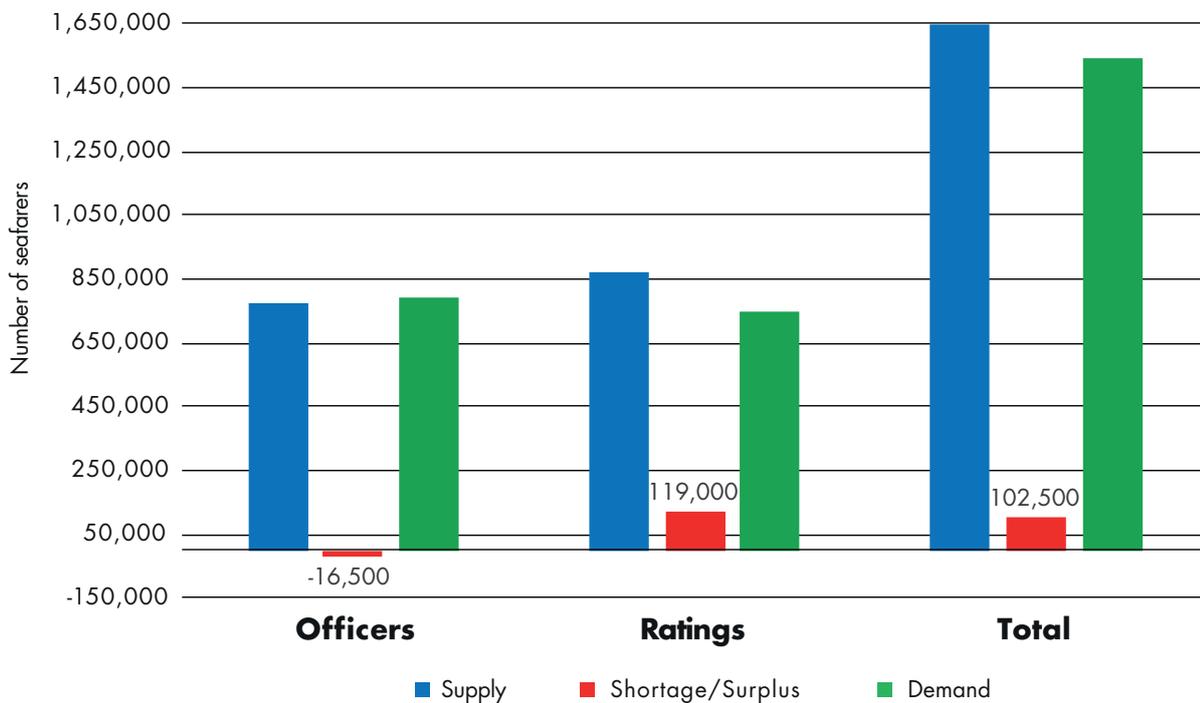
Whereas the estimated demand for officers and ratings increased between 2005 and 2010 by 33.8% and 27.5% respectively, the trend of the demand for officers has continued whilst only a small increase in demand for ratings has appeared since 2010.

Estimated supply and demand situation in 2015

The estimates prepared for the 2015 report indicate that the current global supply of seafarers is around 1,647,500 seafarers, of which approximately 774,000 are officers and 873,500 are ratings, and that the current global demand for seafarers is around 1,545,000 seafarers, with the industry requiring approximately 790,500 officers and 754,500 ratings.

The current supply-demand situation is a shortage of 16,500 officers and a surplus of 119,000 ratings, with an overall surplus of 102,500 seafarers.

Current estimated global supply and demand of seafarers



	OFFICERS	RATINGS	TOTAL
Supply	774,000	873,500	1,647,500
Demand	790,500	754,500	1,545,000
Shortage/Surplus	-16,500	119,000	102,500
%	2.1%	15.8%	6.6%

*Source: 2015 estimates

Recruitment and training of seafarers

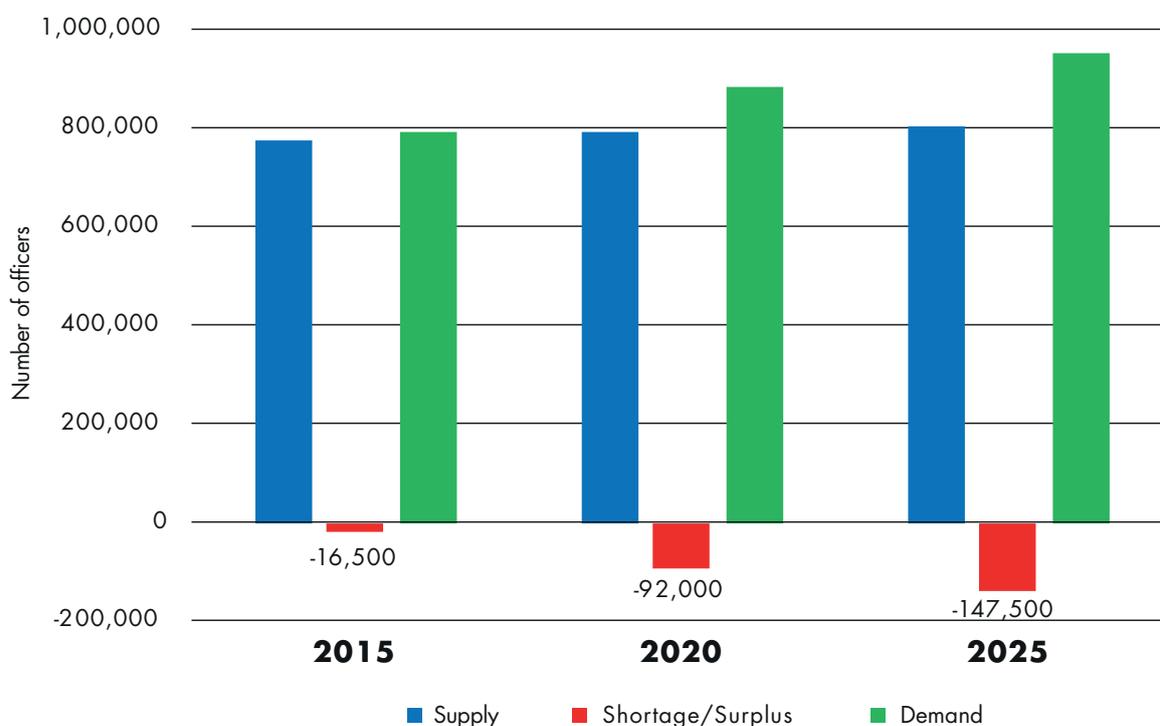
Recruitment and training levels are estimated to have increased over the past five years and wastage rates appear to have reduced below those identified in previous reports. The 2015 report provides information on turnover and wastage rates by rank and role, as well as for select seafarer supply countries.

Whilst the estimated wastage and turnover rates are considered to be generally positive, the current contribution of recruitment and training is not sufficient to reduce the current shortage of officers or keep pace with the forecast demand for officers in the future.

Estimated future supply and demand for seafarers

A basic forecast for the future supply-demand balance is calculated based on the information and data obtained for the 2015 report. The report also presents nine other possible future scenarios (some demand-side and some supply-side) that may affect the future maritime manpower situation, specifically the global supply and demand for officers. The basic forecast is that the global supply of officers will increase steadily, but be outpaced by increasing demand for officers.

Basic forecast for the future supply-demand balance for officers



ESTIMATED SUPPLY-DEMAND BALANCE FOR OFFICERS			
	2015	2020	2025
Supply	774,000	789,500	805,000
Demand	790,500	881,500	952,500
Shortage/Surplus	-16,500	-92,000	-147,500
%	2.1%	11.7%	18.3%

*Source: 2015 estimates

The 2015 report indicates that the forecast growth in the world merchant fleet over the next ten years, and its anticipated demand for seafarers, will likely continue the trend of an overall shortage in the supply of officers. This is despite improved recruitment and training levels and reductions in officer wastage rates over the past five years.

The current maritime manpower situation and future outlook indicate that the industry and relevant stakeholders should not expect there to be an abundant supply of qualified and competent seafarers in the future without concerted efforts and measures to address key manpower issues. It is crucial to promote careers at sea, enhance maritime education and training worldwide, address the retention of seafarers, and to continue monitoring the global supply and demand for seafarers on a regular basis.

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Members of the Project Team

Aron Sørensen	BIMCO	Stewart Inglis	ICS
Peter Sand	BIMCO	Natalie Shaw	ICS
		Milly Dewar	ICS
Zhengjiang Liu	Dalian Maritime University	David Dearsley	DM Consulting
Zhiwei Zhao	Dalian Maritime University		
Junzhong Bao	Dalian Maritime University		
Zhen Li	Dalian Maritime University		

Members of the Steering Committee

Douglas Lang	Anglo Eastern UK (Chairman of the Steering Committee)
Ashok Mahapatra	International Maritime Organization (IMO)
Dennis Barber	Marine Consultant
Dennis Hansen	Thome Shipmanagement
Gerardo Borromeo	Filipino Shipowners' Association (FSA)
Glo Restall	Precious Alliance Ltd.
Ian Cloke	UK Chamber of Shipping
Phil Parry	Spinnaker Global Ltd.
Runa Jörgens	German Shipowners' Association (VDR)
Tjitso Westra	Royal Association of Netherlands Shipowners (KVNR)
Tim Clark	Japanese Shipowners' Association (JSA)

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The complete Manpower Report 2015 can be purchased from Marisec Publications
Shantel.Ryan@ics-shipping.org