

# 中国远洋航务

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与创新方向



**P30** 本期聚焦:  
热议海运战略




**P66** 反垄断执法日趋常态化  
企业该如何应对

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## ABSTRACTS

### China announced recently new measures for the Yangtze River economic belt

A State Council guideline released recently seeks to enhance the traffic capacity of the river and its tributaries. An integrated transport system will connect roads, railways and air routes by 2020. The Yangtze River Delta is a key pole in China's economic growth and the central and western regions boast the largest space for China's economic growth. To build the Yangtze River economic belt is to set up a new chess game so that the coastal regions can support mutually and interact positively with the central and the western regions. The service industry, green energy and modern agriculture feature prominently in plans for the belt, with coordinated urbanization along the river, including the Chengdu-Chongqing city cluster and Guizhou and Yunnan provinces. China's longest river is also one of the busiest inland rivers for freight traffic worldwide. Water resources will be protected through strict control over pollution along the river. The belt will be a new growth engine for the country, help access regions along the upper and middle reaches of the Yangtze and boost growth in inland regions, reducing the development gap between east, central and western regions. Rising in southwest China's Yunnan and emptying into the sea at Shanghai, the Yangtze River economic belt involves nine provinces and two municipalities. **P14**

### Motivation and direction of innovation

The World Economic Forum's Annual Meeting of the New Champions has officially started in the northern Chinese city of Tianjin and Premier Li Keqiang got things going by delivering a speech during the opening ceremony. Innovation has become the hot topic in this Summer Davos forum. This year's forum again focused on innovation as the theme was set at Creating Value Through Innovation. Premier Li referred to China's reforms and opening up as a "grand innovation" during his keynote speech. Innovation is vital to the steady recovery of the world economy. Innovation is also essential to upgrading the Chinese economy and improving

its performance. And it is thanks to reform and innovation that the Chinese economy has in recent years maintained steady and sound growth. China will step up science and technology innovation. The Chinese economy is among the largest in the world, but in many sectors China still ranks fairly low and its traditional, extensive way of seeking growth has been proved unsustainable. Readjusting the structure must be driven, more than ever, by science and technology progress, and that requires strategic, structural, and innovative readjustment. **P22**

### A warmly discussion about shipping strategy

The State Council of China announced the new measures for the Yangtze River economic belt recently, which is paid great attention to by the shipping industry. The publication Maritime China invited some shipping experts to express their opinions and offer advices in the column of Round Table. Some expert said the new measures will promote the entire Yangtze River economic belt and Chinese shipping. Through reforms and opening-up, as well as some key projects, the Yangtze River economic belt are expected to be invigorated, including the delta, city clusters along the central course and the Chengdu-Chongqing economic zone. The regions along the Yangtze are expected to accommodate industries transferred from the coastal east, deepen opening-up and boosting urbanization. Some thinks the effect on the construction of shipping plays an important role, promoting the shipping enterprises to deepen reform, improving corporate governance structure, adjusting the structure of capacity, developing transformation and upgrading, especially promoting the scale and professional management to improve the international competitiveness. **P30**

### Chinese exports accelerating away

Chinese seaborne imports have grown firmly in recent years to reach a total 2.0bt in 2013, and have accounted for a significant proportion of growth in global seaborne trade. While import growth is expected to slow slightly this year (to 6%, from 11% in 2013), growth in exports has accelerated. After increasing by 2% in 2012, exports rose 11% in 2013 to reach 459mt, and have expanded by 19% y-o-y in January-July 2014. Containerisable cargoes account for the largest proportion of China's exports in tonnes, and this year are expected to represent 41% of total shipments. In recent years, growth in exports of containerisable cargoes has been a major driver of total Chinese export growth (accounting for more than 90% of expansion in 2011 and 2012). After slowing to an estimated 4% in 2012, growth in containerisable cargo exports has since picked up, supported by improved consumer demand in Europe and the US. In January-July 2014, estimated containerisable cargo exports increased by 12% y-o-y, with absolute growth of 14mt expected in the full year. The outlook for Chinese seaborne exports remains optimistic, particularly as growth on mainlane container trades from the Far East has picked up notably this year. In addition to improving overseas demand, the Chinese government has been

actively seeking to boost exports, through both domestic policy changes and greater economic co-operation with other developing economies, to whom China is increasingly exporting infrastructure and building materials. While containerisable cargoes are likely to remain a key part and driver of China's seaborne exports, shipments of minor bulk commodities and project-related cargoes could also play an increasingly important role. **P40**

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## Changing look of apparel trade

The Trans-Pacific Partnership could sew a shift in China's sourcing dominance. A pending free trade agreement involving the U.S. and 11 other Pacific Rim countries could jeopardize mainland China's dominance in producing apparel for U.S. consumers. Vietnam is in the best position to gain apparel market share in the United States if the Trans-Pacific Partnership is completed, according to a Reuters analysis. The agreement, which excludes China, would make U.S. apparel imports from Vietnam duty-free, increasing the country's already-growing competitiveness as a producer nation that is currently being driven in part by rising Chinese labor costs. Vietnam has an established infrastructure for apparel production, and its supply chain efficiency is improving, according to JOC Group Economist Mario Moreno. Negotiators working on the TPP met this month in Hanoi, Vietnam, in an effort to complete the proposed pact by the end of the year. Participating countries are Australia, Brunei, Canada, Chile, Japan, Malaysia, Mexico, New Zealand, Peru, Singapore, the U.S. and Vietnam. The participating countries make up about a third of global trade and 40 percent of global GDP. Apparel exports from mainland China accounted for 32.5 percent of U.S. imports in the first half of 2014 compared to the same period a year earlier, according to PIERS, the data division of JOC Group. China's share of total U.S. apparel imports inched up 0.4 percent within the same period. Vietnam, the second-largest source of U.S. apparel imports via ocean container, saw its share rise by 1 percent to a 12 percent share in the first six months of this year compared to the same period in 2013. Bangladesh is the third-largest source of U.S. apparel imports, followed by Indonesia, Hong Kong, Cambodia and Honduras. Hong Kong's figures contain many shipments originating in mainland China. What has been most noticeable, the Seabury study said, was that even fashion items, electronics and industrial parts shipments, which traditionally required fast transit times only available via air freight, have experienced significant shifts from air to ocean freight, with trade lanes from Asia hit the hardest. **P42**

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## The importance of data

If we don't know what has gone wrong, how can we ever put it right? This might seem an obvious question, but the fact that it is still asked is a reflection of a problem that remains very much alive in the marine industry. The old adage that "a problem shared is a problem solved" might be equally true,

but when it comes to sharing data about accidents, incidents, near misses, or a difficulty that might develop into something that is safety critical, we are still hesitant about making these matters more transparent. Shortly after taking up the office this July, the current Chairman of the International Association of Classification Societies (IACS), Mr. Philippe Donche-Gay, said that one of his current priorities during his year in office is to look at how design data might be shared to better understand how an accident has happened. And at a meeting on the future of ship safety last year, the Secretary General of the International Maritime Organization (IMO), Mr. Koji Sekimizu, suggested that improved data collection was an essential part of successful risk based methodology, an essential element in the development of better regulations. Information matters and can be very influential in the enhancement of safety. The fact that the industry is so international with the often considerable number of interests from many countries also tends to complicate the situation and make it easier to prevent the transmission of useful data between parties. One only has to look at some of the larger casualties in the maritime world to see the obstacles that are sometimes put in the way of transparency, but also the way in which lawyers are enabled to exploit the situation for the advantage of those whom they are representing. The pity is that these legal niceties now so often prevent important safety information from being promulgated to those who might benefit from such data. It can only be hoped that pressure from the IMO, with the encouragement of classification societies, might be effective in devising a more effective process for the treatment of this important data, which can be so useful in the enhancement of safety. **P44**

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## African Minerals on growth track in Sierra Leone

West Africa is figuring more prominently in the dry bulk trades and the region's biggest iron ore exporter says it has safeguarded against the Ebola outbreak and remains firmly on course to expand African Minerals (AML) is sitting on around 12.8 billion tonnes of iron ore resources at its recently developed Tonkolili mine in Sierra Leone, and the facility has already taken on the mantle of West Africa's largest exporter. It is expecting to increase shipments significantly over the coming years on the back of healthy demand from China. The next phase of the mine's development will see it shift from the direct shipping of ore to producing a higher-grade concentrate product. AML also controls the rail and maritime infrastructure, including the port and transshipment area. It tranships at a deepwater anchorage 64 kilometres (40 miles) from its Pepel loading terminal. The focus so far has been on increasing production and the practicalities of logistics. AML thinks in the future it will be acquiring assets and finding strategic shipping partners in the shipping business. Ebola is another issue the company is taking seriously. The remoteness of loading offshore makes it safe, AML believes, but it is not taken for granted. **P46**





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