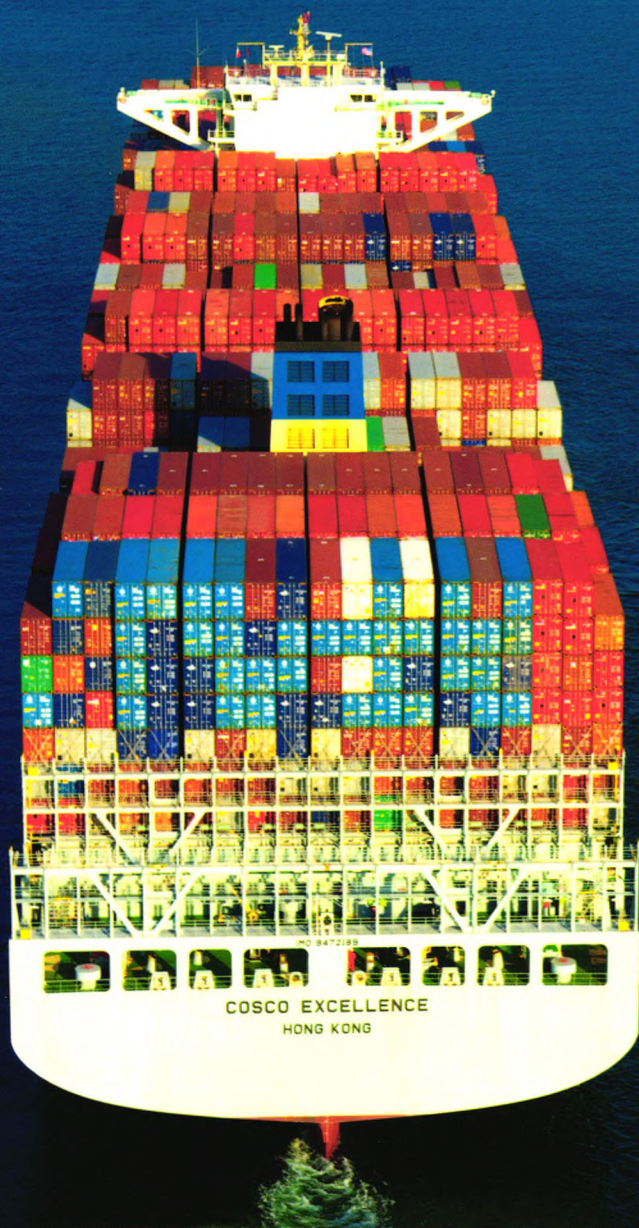


中国远洋航务

ISSN 1673-6664
CN 11-5518/U

P22 聚焦长江 Focus on the Yangtze River



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NOVEMBER 2014 11月刊

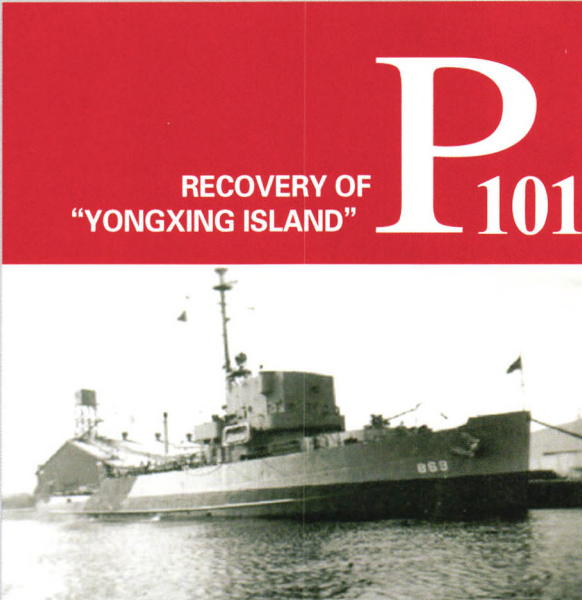
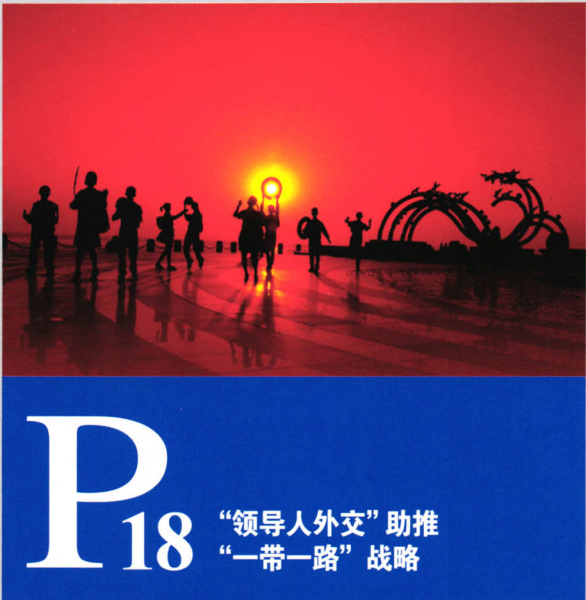
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ABSTRACTS

Leaders' diplomacy boosts strategy of Silk Road Economic Belt and Maritime Silk Road

Since the 18th National Congress of the Communist Party of China, China's new central collective leadership members have taken the pains to visit far and near. Especially President Xi Jinping and Premier Li Keqiang take the lead to visit foreign countries 16 times, covering 47 countries in five continents, making significant achievements for China's strategic coordination and pragmatic cooperation in the construction of a global network. In 2013, two notable concepts were put forward, one was the "Silk Road Economic Belt" by President Xi Jinping during his visit to the Central Asia, and the other was the "21st Century's Maritime Silk Road", first officially mentioned in a speech presented by President Xi in Indonesia and later in an official introduction made by Premier Li Keqiang at the 16th ASEAN – China Summit in Brunei. The concepts of a "Silk Road Economic Belt" and a "Maritime Silk Road" envisioned by China's new leadership would not only provide an unprecedented opportunity for the country's overall development and its relatively backward western regions but also stand for great cooperation in this broad region aimed at connecting the Asia-Pacific and European economic economies. The establishment of an unblocked traffic, trade and capital network is the strategic objective of this grand proposition, while policy communication and heart-to-heart links among the various peoples constitute the prerequisite and foundation for the realization of the "great opening-up" strategy. **P18**

Focus on the Yangtze River

The proposed Yangtze River Delta belt will be a new growth engine for China, 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. 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 publication *Maritime China* started the reporting activities themed on the "Yangtze River" beginning at the end of May this year, covering 11 provinces and two municipalities along the river. Through interviewing with government departments, experts and scholars, ports and logistics enterprises, the publication tries to present the readers a panoramic view of the construction of the golden waterway of the Yangtze River economic belt. Shanghai City: being the market leader in the whole Yangtze River economic belt, Shanghai will accelerate the construction of international shipping center logistics transportation system and modern shipping service system. Jiangsu Province: located in the lower reach of the Yangtze River and adjacent to Shanghai, Jiangsu could reach the river and the sea, which means the portal's unique geographical advantages. Zhejiang Province: relying on the modern comprehensive transportation system of the powerful port, road network, aviation, water transport and logistics, Zhejiang tries to build up the "fast track" to adapt to its own characteristics, its own economic and social development. Anhui Province: trying to make full use of the golden waterway to complete the eastern, central and western horizontal run-through, Anhui will enhance the regional economy. Jiangxi Province: relying on the golden waterway of Yangtze River and promoting to speed up the release of "gold effect" will bring a new round of development opportunities for Jiangxi. Hubei Province: the Yangtze River is like a dragon and Hubei is the waist of it. So the construction of Wuhan Yangtze River shipping center is of great significance. Hunan Province: giving full play to its regional advantages, the province will usher in the "golden age" of transportation development. Yunnan–Guizhou Provinces: because of the shortage of water transportation construction, the logistic cost of the two provinces is high and thus, weakening the competitiveness. It has become the consensus of the two provinces to promote waterway transportation construction to serve the economic and social development. Sichuan Province, lying on the upper reach of Yangtze River and being the most potential economic province, it is the supporting area of the western Yangtze River economic belt. Sichuan can play an important role in the rise of the Yangtze River economic belt. Chongqing City: owning the level 1 channel, 5000-ton deep-water wharf and bonded port area on the upper reach of the Yangtze River, with waterway freight volume and port throughput both breaking through one hundred million tons, Chongqing will speed up the construction of the upper reach of the Yangtze River shipping center. **P22**

Shipping's investment saga – the next trillion dollars

In the early 1990s when shipping emerged in a fragile state from the traumas of the 1980s, raising finance was a problem. The shipping banks had taken a battering in the 1980s, and the US financial

crisis had taken out the American banks. 'Basel 1' made getting a loan over \$25m difficult, syndications were rare and the capital markets were unapproachable. Against this background, estimates that the shipping industry would need to raise \$200 billion to finance investment during the 1990s seemed an impossible mountain to climb. In fact these estimates of future investment requirement, based on the need to replace the ageing fleet and allow for expansion of the key tanker, bulkcarrier and containership fleets, proved to be on the low side. During the decade investments in new ships added up to about \$340 billion. And of course, miraculously, the money appeared. Syndications, club deals, capital market transactions, the German KG market and a few new banks filled the gap. Shipping needs the investment, but where will the money come from? Most analysts agree there's a tidal wave of cash sloshing around the world, looking for a home with a good story. Unfortunately shipping's financial story remains a bit patchy, but the reassuring lesson of the 1990s is that there's always someone who will find a way to do the business. Who will it be this time? Well, that's the trillion dollar question. **P68**

Asia-Europe trade: from bad to worse

With new capacity coming in and the winter slowdown looming, the world's largest trade is again becoming carriers' Achilles' heel. To understand how deeply the Asia-Europe trade is holding carriers' bottom lines hostage, one just needs to look at the numbers. Spot freight rates on the head-haul westbound trade out of Asia slumped to just \$822 per 20-foot-equivalent container unit in late September, according to the Shanghai Containerized Freight Index, less than half the \$1,765 rate at the beginning of the year. And with reports of shippers being offered rates as low as \$650 per TEU on the eve of China's Golden Week vacation at the beginning of this month, carriers were bracing for further declines when the trade's biggest market returned to work. Maersk faces aggressive competition on its most lucrative north-south routes as other carriers deploy vessels displaced from the Asia-Europe trade. Maersk's focus on the north-south routes is a reflection that it can now afford to go easy on the Asia-Europe trade, which, along with sharply lower costs, played a key role in the carrier's \$1 billion operating profit in the first half of the year when most of its rivals were sinking deeper into the red. And the trade continues to drive earnings, with Macquarie Equities Research basing its forecast of a full-year profit of \$1.9 billion to \$2.1 billion on incremental cost savings following the introduction of the 12th Triple E vessel that will enable the AE0-10 service to enjoy further savings in unit costs. The north-south trades may be the future, but right now there's no escape from the Asia-Europe route's grip on container shipping. **P70**

Ballast water management issues: the current state of play

With the recent ratification by Tonga and Congo, the status of the International Maritime Organization's (IMO) International

Convention for the Control and Management of Ships' Ballast Water and Sediments, also known as the Ballast Water Management (BWM) Convention, is that 40 IMO member states covering some 30.25% of the world's registered Gross Tonnage have so far ratified the convention. The IMO Secretary General recently announced that the governments of Japan and Turkey have passed the national legislation to approve ratification of the BWM Convention. There are, however, concerns regarding the ability of these systems operate in a compliant manner under all conditions and at all times, as well as uncertainties with respect to actual enforcement of the BWM Convention, especially with respect to sampling and analysis/testing of managed ballast water. A major concern is the lack of confidence in the efficiency and reliability of BWMS approved under the scope of the BWM Convention's Guidelines for approval of Ballast Water Management Systems (G8). Owners are urged to exercise due diligence when approaching manufacturers and vendors of BWMS in order to safeguarding their investments. It is of the utmost importance to request all information and data related to the approval process, including the full shore and shipboard test results. The BIMCO Secretariat has compiled a list of general issues related to installation or retrofitting of a BWMS as set out in the article. **P72**

Shipping's elite plots course towards a sustainable future

Company bosses, government ministers, brokers, economists and many more focus on unleashing the potential of shipping. The forum, in the unusual setting of an out-of-town former warehouse now used for concerts and other events, saw more than 200 people from almost 40 countries exchange views on a variety of themes aimed at unleashing the potential of the global maritime industry and meeting the challenges, especially in the next 15 years when world trade and the global fleet is expected to double. One of the conclusions was that, despite huge inequalities, the world is becoming a more affluent place. To move forward, the industry needed to stimulate creative thinking and new solutions — and to achieve that it was necessary to focus on a few topics, listen to the experts, “get the juices flowing”, talk in groups and summarise. A big challenge ahead was to recruit and train the extra 40,000 officers needed to handle an expected doubling of world trade in the next 15 years and similar growth in world fleet capacity. On finance, the question arose of how to move shipping towards being an investment grade industry and what needed to be shared with those wanting to enter shipping. Two different workshop groups came up with the idea of an organization representing the whole of shipping, akin to the air industry's International Air Transport Association (IATA). Shipping had a great story to tell but was not very good at getting its message across. Although financial viability and environmental requirements had been highlighted in forum discussions, delegates should not forget safety as a third sustainability parameter. Compared to other industries, shipping was “not performing well”. **P74**



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