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2013至2014年世界经济形势分析与展望



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本期聚焦:

回顾与展望



P62

印尼镍矿和铝土矿出口禁令对中国进口及海运需求的影响



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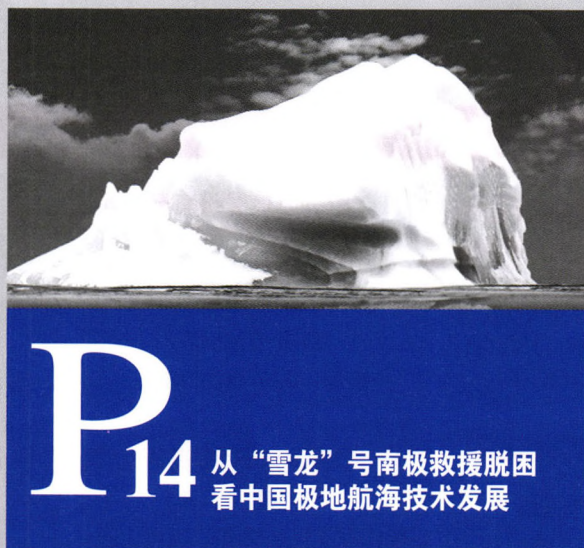
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ABSTRACTS

Analysis and prospect of the world economic situation

In 2013, the world economy still marched on bumpy road to recovery. Developed economies continued to consolidate the economic recovery. The United States' and Japan's economy entered a slow growth channel. The euro zone's recession was over and showed signs of recovery. Emerging markets and developing economies entered the process of structural adjustment, a further slowdown in economic growth. Looking ahead to the world economy in 2014, many factors are noteworthy such as the United States "exit" quantitative easing and its spillover effects, the debt problems in developed economies, regional trade negotiations, trade and investment protectionism and so on. It is expected that global economic growth will remain at the mid and low level. In order to reflect the overall development situation of the world economy in all directions in 2013, the essay reviews it in five aspects from the level of economic growth, employment, prices, trade and investment, public debt one by one. In 2014, the global economic recovery will still be on bumpy roads and the sharp economic rebound is less likely. But compared with the year 2013, the economic growth in 2014 is likely to rise slightly, as a 3.2% of the growth rate in PPP terms or 2.6% at market exchange rates. **P20**

The way for Chinese enterprises to enter the U.S. energy market

The United States energy market is a very interesting and attractive investment market. Since 2013, some large Chinese state-owned enterprises and even private corporations have developed their interest in the market. The recession of U.S. economy makes its small and medium-sized oil and gas companies in urgent need of funds to develop the business, also provides a rare opportunity for Chinese investors to enter the United States energy market. Chinese enterprises should seize the opportunity of "going out", actively participate in the energy market of

the United States investment activities. In the process of "going out", Chinese enterprises should study the advanced technology and management experience of American shale gas development, and apply it to China's vast shale gas development project. It will be the best attempt for Chinese investors with smaller funds to buy oil field that has been proven reserves with low risk to enter the market. This article is to explore the way of entering the United States energy market by directly buying American oil and gas blocks. This kind of investment has its uniqueness. **P26**

Focus: review and prospect of shipping

In the background of the global economy and industrial structure adjustment, seaborne trade slowdown in demand and capacity imbalances constitutes the freight rate of the global shipping market was low and recovery twists and turns in 2013. Looking ahead to 2014, the shipping market will get steady adjustment and show recovery trend, with its fluctuating amplitude gradually narrowing. Separately speaking, the world container transport market in 2013 underperformed 2012, freight rate showed generally downward trend. It is expected that, under the premise of the developed economies gradually increases power in 2014, the volume of the world container will be recovered, and the volume growth will exceed capacity growth. But the earlier accumulated market fundamentals of oversupply in the short term will be hard to be changed. In 2013, the recovery of the international dry bulk shipping market was relatively obvious, but if looking from the long period it was still historically low, showing a long way to recovery. Capacity growth in 2014 will drop to a decade low. The long-time marginal imbalance between supply and demand of the market will be able to reverse. It will remain weak balance throughout the year. Under the background of excess capacity, the international tanker transportation market in 2013 remained low volatility trend as a whole. Thanks to the continuing growth of global oil consumption, the general situation of international tanker transportation market in 2014 is expected to be better than 2013. The general cargo, multi-purpose and specialized carrier transportation market in 2013 as a whole continued its downward trend, the low market level being less than 2012. In 2014, the demand and shipping capacity of new ships will remain stable growth relatively, and thus supply and demand will be improved. The overall market is slowly recovering and general situation of the market is expected to be better than 2013. In 2014 and even in the next few years, the global port industry will be in deep adjustment. The port production overall will continue to maintain steady growth, but the competition between ports and regional port group will further intensify. Great changes of regional port market share might occur. In 2013, although the shipping market performance is still poor, but the global newbuilding market rebounded strongly. Newbuilding price picked up and stabilized after declining for more than two years.

But the surging volume overdrove the market demand to a certain extent, which will lead to a significant fall of newbuilding trading volume in 2014.**P30**

Asia's clearing skies

Improving economic conditions in the U.S. and Europe point to solid growth in Asian exports, but it's not clear sailing yet. If, as Bob Dylan once famously croaked, "The answer is blowin' in the wind," then Asia's macroeconomic weather vanes are indicating fair to medium tailwinds, albeit with a risk of low pressure. The outlook certainly looks better now than it did a year ago. Fourth quarter 2013 data from major markets beat analyst expectations, and the JPMorgan-Markit global Purchasing Managers Index produced by reached 53.3 in December, the highest reading since April 2011. The eurozone is forecast to move out of recession this year, with PMI data — which has consistently led GDP growth — suggesting further expansion, boosted by rising consumption in the U.K. and the improved performance of periphery countries. Most analysts expect this to lead to accelerating GDP growth in 2015 and 2016. Against a backdrop of burgeoning consumer confidence and low natural gas prices, U.S. GDP also is predicted to grow more quickly in 2014 than it did last year. Indeed, global economic output is set to expand 3.5 percent in 2014, up from an estimated 2.9 percent last year, according to PwC. China's solid economic expansion and rising demand for imports also will boost intra-Asia trade in 2014. Ample reasons remain for caution on Asia's prospects for 2014, however. The eurozone still needs further reform of its financial sector, while the U.S. and Japan are struggling with high government debt and related fiscal risks that could hurt GDP growth and trade. **P56**

Meet Angus Frew –new BIMCO Secretary General


Angus Frew joined BIMCO as the new Secretary General on 1 October 2013. The BIMCO Bulletin interviewed him after 6 weeks in the job. He said that "it is too early to say definitively after only 6 weeks in the job. At a macro level, I will be focusing my time on gaining a better understanding of how the members see the current organisation. Some of the key questions I will be asking are (i) what are the things that the members like and don't like about the current organisation, (ii) which products and services they value, (iii) what BIMCO should be doing more of, and last but not least, (iv) what BIMCO should do less of or stop doing altogether. I am a great believer in doing fewer things better. I will be looking at how we can recruit more new members, and once in membership, how we can better retain those members. Our aim is become indispensable to our members, and for this to be recognised throughout our member organisations. We have a very important relationship in the Round Table of international shipping associations, where BIMCO gets together on

a frequent basis with the other members (International Chamber of Shipping, INTERTANKO and INTERCARGO) to discuss and agree where possible a common way forward on matters considered to be crucially important to the shipping industry. A key task of mine is to make sure we live within our means. BIMCO has made a small loss in three of the last four years that has eroded the liquid reserves of the organisation. It is my intention that all budgets from 2015 onwards should show a small surplus..." **P58**

Crude tankers take centre stage as upbeat Euronav swoops on VLCCs

While most had their feet up for the holidays, Belgium's Euronav was hard at work taking a massive punt on the big tanker market, as revealed by TradeWinds, and that bullishness is echoed by a number of analysts who predict rising rates for crude tankers in 2014. Shipping analysts say 2014 will be the year of the seagoing workhorse — the tanker. Here arrives Euronav with a \$1bn bet on crude carriers. And the upbeat Belgians will use it to list on the New York stock market, having already raised \$150m from committed shipping investors GoldenTree and York Capital. It is not just analysts such as Frode Morkedal at Platou who is gung-ho for tankers, anyway. Omar Nokta of Global Hunter Securities is also predicting higher annual rates — particularly for VLCCs and suezmaxes — over the next three years. ICAP Shipping reported last year that the oil-tanker trade was growing at its fastest level in a decade, driven by that extraordinary turnaround in US shale derived crude production. The increasing self-sufficiency of North America is forcing oil-producing countries such as Angola and Venezuela to find new markets. These are generally in Asia. China and India in particular have become enormous growth areas for shippers. **P60**

The impact of Indonesia's ore export ban on Chinese import and shipping

China is a major importer of Indonesian nickel and bauxite. Since 2010, China has imported a large number of nickel ore, with Indonesia and the Philippines as the main supply area. In 2011, China's nickel ore imports were 48.25 million tons, of which 25.70 million tons from Indonesia, accounting for 53.3% of the total. From the Philippines, China's imports of nickel ore were 22 million tons, accounting for more than 45.6%. Most of the imported raw materials of laterite nickel ore were used in the manufacture of nickel pig iron. In 2012, China's nickel ore imports accounted for 89% of the world. From January to November 2013, 68% of China's bauxite and 57% of the nickel ore were from Indonesia. But Chinese companies do not intend to invest to build smelter in Indonesia to get this kind of raw material in return. Therefore, Indonesia's mineral raw material export ban will have a big impact on the shipping and related industry of China. **P62** 

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