

中国远洋航务

ISSN 1673-6664
刊号: CN 11-5518/U

P20 央企改革之
大重组行将开始

P26 本期聚焦:
我看2015

P42 “中欧陆海快线”
助力中欧经贸合作

 中远航运股份有限公司
COSCO SHIPPING CO., LTD.

特种运输 承载梦想



CONTENTS

JANUARY 2015 1月刊

目录



《中国远洋报》
微信



《中国远洋航务》杂志
微博



观察 WATCH

- 2 航运人语 拥抱新希望
- 4 媒体 新极地规则以强制措施保障航行安全及保护环境等
- 12 速读 声音 / 数字 / 漫画
- 14 看点 借力现代航运服务业 助推建设海洋强国等
- 16 视界 《中华人民共和国航道法》今年3月正式施行等
- 19 趋势 海湾OPEC成员国预计到2015年底油价重返70美元

全局 OVERALL

- 20 央企改革之大重组行将开始
——对央企重组改革模式与途径的思考
- 24 天津广东福建，领跑自贸区2.0版

聚焦 FOCUS

- 26 我看2015

专栏 SPECIALS

- 42 “中欧陆海快线”助力中欧经贸合作
- 44 西非铁矿石：中国进口铁矿石市场的后起之秀
- 46 陷入困境
- 48 欧盟与航运相关的部分法规政策摘要
- 50 船东推动建立极限灵便型散货船联营体
- 52 百问百答

业界 SHIPPING INDUSTRY

- 54 湛江：蓝色丝路再续辉煌

- 56 从服务贸易看我国海运发展
- 60 关于集装箱码头前沿操作工艺应对船舶大型化的研究

法律 LAW

- 64 解析2015版《仲裁规则》主要变化

管理 MANAGEMENT

- 66 企业内部审计如何拥抱大数据时代的到来

港情 PORTS

- 68 文化塑“型” 助推太仓码头新发展

市场 MARKET

- 72 述评 世界经济
- 74 述评 中国港航股指
- 76 述评 全球集装箱运输市场
- 77 述评 全球干散货运输市场
- 78 述评 全球油轮运输市场
- 80 述评 国际原油市场
- 82 述评 国际燃料油市场
- 84 述评 全国主要港口
- 85 述评 全球主要港口

记忆 MEMORY

- 86 我的日内瓦情结
- 87 《心住南海》英文节选（续）



ABSTRACTS

China's central SOES will undergo reform

Supervision of China's central state-owned enterprises (SOES) will undergo reform in 2015, according to a pledge by the State-owned Assets Supervision and Administration Commission (SASAC) made recently. In a meeting attended by the leaders of centrally administered SOEs and local regulators, the SASAC said its work in 2015 will center on quality and efficient growth to actively adapt to the country's economic "new normal". Although China's central SOEs are deemed as the backbone of the economy, the public has long complained about SOE monopolies in several sectors, low efficiency and corruption. SASAC head Zhang Yi said one of the major tasks next year is to deal with inefficient and financially distressed companies, to either close them or force them into acquisitions and mergers. Meanwhile, the SASAC will push ahead with reforms such as developing mixed ownership and continue the fight on corruption. Zhang disclosed that the combined profits of the SOEs under the SASAC supervision totalled 1.95 trillion yuan (318.6 billion U.S. dollars), up 5.2 percent year on year. **P21**

The establishment of FTZ in Tianjin, Fujian and Guangdong following Shanghai

On 12 December 2014, the State Council approved the second-round of the establishment of free trade zones in Tianjin, Fujian and Guangdong, about a year following the launching of the FTZ in Shanghai. The three free trade zones will follow the model of the FTZ in Shanghai, whilst local characteristics would be considered. For Tianjin, a free trade port, shipping and financial leasing are expected to take lead in the zone as the city has long been a major shipping center in Northern China and has experienced the huge success of the financial leasing business in recent years. In a bigger picture, the Tianjin zone, will play a significant role in the economic integration of the "Jing-

Jin-Ji" region which includes Beijing, Tianjin and the Hebei Province in Northern China. Internationally, the Tianjin zone will face Northeast Asia and will surely be the window for the China-Korea Free Trade Area. The Guangdong zone will mainly focus on logistics and financial industries, given the Province's longstanding tradition in manufacturing and foreign trade. With borders with both Hong Kong and Macau, the Guangdong zone aims to expedite the economic integration of the "Yue-Gang-Ao" region which includes the Guangdong Province, Hong Kong and Macau in Southern China. Last but not least, for the zone to be set up in Fujian, the biggest motivation behind is the economic integration with Taiwan which faces the Fujian Province across Taiwan Strait to the west. Regarding focus of the Fujian zone, spotlight is shed on high-profile service in regard to shipping, logistics, finances as well as the export-import trade with Taiwan. Like Shanghai FTZ, the newly approved zones will be established on the foundation of the existing economic zones therein, rather than starting from scratch. For the second-round free trade zones, experience could be drawn from Shanghai FTZ in terms of the foreign investment record of reform (so that foreign investors no longer need to seek government's approval for conducting business within certain industries) as well as the negative list management model. The free trade zones all aim at implementing administrative reform and economic reform for China so as to create a more efficient and free market environment for foreign investments. **P24**

2015 in my eyes

At the beginning of New Year, the publication Maritime China invites senior experts of shipping industry to give readers detailed analysis on the events, phenomena and trend of different market segments, which will help you see the trend and direction of the times and its essence and regularity of shipping phenomena. Their points of view are as follows, China's shipping enterprises embraced a recovery across the board in 2014 as their financial results for the period show that majority of shipping enterprises listed on China's A-share market saw a sharp increase in their profits. Analysts note that the rising rents of capesize ships have boosted the continuous increase in BDI. This round of rise in BDI is affected by the large amount of iron ore shipments by Vale, an iron ore giant in Brazil. At present, there is intense competition facing the iron ore producers. In the fourth quarter of this year, iron ore producers in Brazil have increased efforts to ship more ores. Due to absence of fundamental reverse in supply and demand, the BDI rising trend is not sustainable. Therefore, the freight rates are still under pressure. Improvement in the supply and demand of shipping market will likely last to 2015, contributing to the constant recovery in BDI. However, generally speaking, the market still sees a glut, which, to some degree, will cap the room for improvement in rents and BDI. The rising BDI has played a positive role in helping the domestic

listed shipping companies improve business performances for the first three quarters and also lifted the market sentiment. From the perspective of financial pressure, shipping companies basically faced the pressure from the increase in leverage ratio and financial expense rate. Nine out of the 13 listed shipping companies saw continuous year-on-year increase in asset-liability ratio. It is worth noting that subsidies for ship recycling has also played a big role in helping shipping companies improve business performances. Since the country issued a subsidy policy for ship recycling at the end of last year, many companies have increased efforts to dismantle old ships. Despite the overall recovery in the country's shipping industry, the country's shipbuilding enterprises saw a polarization in business performances. Most analysts believe that the satisfactory business performances of China's shipping enterprises do not mean a turning point for the shipbuilding sector. **P26**

Land-sea express line to promote Sino-Europe cooperation

On Dec.17, China, Serbia, Hungary and Macedonia agreed to build a land-sea express route, which links the Greek port of Piraeus in the south and the Hungarian capital of Budapest in the north, stringing together the Macedonian capital of Skopje and Serbia's Belgrade. Chinese premier Li Keqiang made the observation that the encouragement of trade and investment serves as a remedy for resisting downward pressure while the global economic recovery remains weak. Upon completion, the land-sea express route will help scale up trade between China and Europe and speed up the development of countries along the route and other Central and Eastern European (CEE) countries. The land-sea express line will narrow the gap between European countries and promote the balanced overall development of Europe. This route serves the interests of less-developed CEE countries as they try to seek cooperation with partners outside Europe to shake off the effect of the European debt crisis. The line provides the CEE countries with an opportunity to achieve deeper cooperation with China and inject a tremendous boost to their economy. Chinese President Xi Jinping and Chinese premier Li Keqiang signed a flurry of agreements during their visit to Europe which have opened a new chapter of cooperation between China and Europe. Investment in building the route will spur economic growth and stimulate employment. The construction of the link will also help to remedy China's problems of overcapacity by opening up a convenient new channel for the import and export of products between China and Europe. **P42**

West African iron ore: up and coming in China

In the first nine months of 2014, China's appetite for iron ore imports has continued to impress, with seaborne imports during the period totalling 685mt, reflecting a y-o-y increase of 18%. While most of the growth has been driven by Australia, it is

worth noting that countries in West Africa have also played a role, with imports from the region totalling 25.1mt in the year to date, up 44% y-o-y. It is clear that the development of African iron ore exports to China has been significant. In the future, this will depend on investment in infrastructure, as well as obvious political and pricing issues. Nevertheless, given Chinese investment in the region, West Africa in particular looks set to play an increasing role in Chinese ore imports. **P44**

Stuck in a rut

Weakening demand in key European and Asian markets will make it difficult for U.S. containerized exports to gain traction until 2016. Last spring, the World Trade Organization forecast global trade would grow 4.7 percent in 2014, but it cut its growth forecast for 2015 to 4.0 percent from its previous forecast of 5.3 percent. The downward spiral for U.S. exporters of containerized cargo has been even less inspiring, and U.S. containerized export volumes will continue to be sluggish in much of 2015. In the aftermath of the global recession, U.S. containerized exports have weakened because of two factors, Moreno said. On the one hand, global demand for raw materials and finished goods has faltered in Asia and Europe. The European and Japanese economies have been in recession, and China has been undergoing a period of relatively slow economic growth, as it transitions from an export-led economy to one focused more on satisfying domestic consumer demand, and on providing higher-value products and services. On the other hand, the value of the U.S. dollar has risen against major currencies such as the euro and the yen, making it more difficult for some U.S. exporters to compete in foreign markets, especially those in Europe, Japan and China, where non-U.S. manufacturers offer their own high value-added goods. Moreno expects the value of the dollar to increase further in 2015 because of expectations that the U.S. Federal Reserve "will hike rates after being close to zero for the past four to five years." **P46**

Owners push pool plan for abundant ultramax

Scorpio Bulkcarriers is moving to set up an ultramax pool as shipowners struggle with an employment dilemma for new and soon-to-be-delivered tonnage. Pools may be a speculative owner's best hope as the market prepares for a flood of ultramax newbuildings — but bankers are proving hard to convince. Shipowners say they have been approached by Scorpio Bulkcarriers about forming a new ultramax pool, although in some cases the owners are faced with their bankers insisting on time-charter commitments at loss-making but guaranteed rates. One advantageously positioned ultramax owner says the key to profitability is operating your own ships directly for the end user on a per-tonne basis rather than hiring them out by the day, which he finds characteristic of a speculative shipowner. **P50**



打造世界一流 船舶重工企业



中远造船工业公司

ISSN 1673-6664

