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P20 对当前国际经济管理
体制改革的几点建议



P22 特别报道:
以实力赢未来



P26 本期聚焦:
中国理货业
五十五年蝶变

中遠海運港口有限公司
COSCO SHIPPING Ports Limited

The Ports For All



万方数据

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专访中远海运港口有限公司副主席兼董事总经理张为

The Ports For ALL



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ABSTRACTS

Suggestions on the economic management system reform

- to the G20 summit held in Hangzhou

The authors suggest that China's leaders should make full use of the G20 summit held in the eastern Chinese city of Hangzhou this September to express their views to the problems of how to change the world economy's continuing slow growth and promote the world economy a rapid development. "To solve the deep problem of the world economy, depending on pure monetary stimulus is not enough, we must be determined on doing more efforts to promote economic structural reform, making the supply system more adaptable to the change of demand structure." Eight years has passed since the G20 summit system was upgraded from the ministerial level to the head of government on November 15, 2008, but a permanent mechanism has not set up yet. The author suggested that a secretariat should be set up for the group of 20 countries to provide more consulting and information service for the leaders and ministers of the G20 and publish them on a regular basis to expand the influence of the group of 20 nations. The world trade management system should also be reformed. **P20**

To win the future by our strength

- an interview with Mr. Zhang Wei, Vice Chairman and Managing Director of COSCO SHIPPING Ports Limited

On August 26, 2016, COSCO Pacific Limited held the Renaming Ceremony and Project Promotion Conference, during which it officially changed its name to COSCO SHIPPING Ports Limited. This renaming effort is intended to leverage the advantages from the consolidation and set clearer strategic goals for COSCO SHIPPING Ports, which will be transformed into a specialized port and terminal operator. As the basic points and strategic pillars in the Group's global network, ports have developed a favorable pattern of mutual promotion

and coordinated development with shipping, logistics and relevant businesses along the upstream and downstream in the industrial chain. China COSCO Shipping will strive to be a global leader driven by dual wheels – ports and shipping. Serving as a pioneering platform for implementing the Group's globalization strategy, COSCO SHIPPING Ports shall develop a new strategy of expanding its global footprint, a new model of building integrated solutions for the industrial chain, a new path of stepping up international cooperation, and new value from sustained focus on customers. Zhang Wei pointed out that, relying on the unique advantage of the world's No. 1 integrated shipping line, No. 4 container fleet and the Ocean Alliance, COSCO SHIPPING Ports will sharpen its overall competitiveness through reform, set eyes on both domestic and overseas markets, and actively seek cooperation with all stakeholders to build strategic pivotal ports and important gateway ports. In addition, it will enhance the strategic synergy between shipping and ports in an effort to become a comprehensive container service platform encompassing terminals, logistics and shipping. **P22**

Great changes of China's tally industry in 55 years

- a look at the future of China's tally industry from China Ocean Shipping Tally Company

Ocean shipping tally is an indispensable important link for the international carriage of goods by sea in the process of the transition, its market structure is undergoing profound changes. With the introduction of competition mechanism to tally industry in our country, the topic of opening up tally market gradually, how to plan the future of the tally industry and how to keep the sustainable and healthy development is paid attention to by the shipping industry. On September 1, the first Chinese tally company, China Ocean Shipping Tally Company ushered in the 55 years old birthday. 55 years ago, China Ocean Shipping Tally Company was shouldering the burden of the systemic and normative development of Chinese tally industry. The Company was the subordinates and transformed from the tally department of the original Ministry of Communications, unifying the coordination and management of the ports of ocean shipping tally company business and playing a regulatory role for the national ocean shipping tally market. Half a century later, the China Ocean Shipping Tally Company has become the world's biggest tally company of completing last year's tally quantity, which reached 157 million tons in 2015 and 120 million TEU. As a microcosm of China's tally industry development, the China Ocean Shipping Tally Company has lead China's tally industry to blaze new trails constantly. The Company has experienced from the industry fragmented and disorganized to the management system and standardized operation, from the artificial practices depending on pen and paper to the modern information technology, from the vicious competition and market disorder to rational competition and the transformation of harmonious development, walking out of the tally development road with Chinese characteristics. The Company has made an indelible contribution to the prosperity of China's foreign trade and promoted the production safety of port and waterway administration. Taking history as a mirror

and looking into the future, the Focus Column of this issue lets us look at the guide picture of China's tally development from the change of the trajectory of China Ocean Shipping Tally Company.**P26**

Shipping network development in our country

The current shipping market and the rules are in a long round of adjustment. In order to meet the need of the development of global supply chain, the shipping service network has become the basic strategy to adapt to the new situation. The Internet of Things, Big Data and Cloud Computing and the Internet has a widespread application in shipping day by day, providing the technical support network for the low cost operation of the shipping service. Looking from the national development based on shipping in the strategic positioning and development of our country and facing the situation for promoting the construction of maritime power, the State Council has issued several opinions on promoting the healthy development of maritime industry, explicitly putting forward perfecting the task of global shipping network. Therefore, no matter from the shipping development trend of the world, or from adapting to the national strategic perspective, we need to continue to improve our country's shipping network service level.**P38**

Chinese “teapot” refiners enter into the global oil trade


Chinese crude oil imports have historically been dominated by a handful of state-owned companies. However, since mid-2015 Beijing has started to liberalise China's oil market, and is gradually allowing more independent refiners to process imported crude, and import crude oil directly. One year on, China's “teapot” refiners are helping to boost China's crude import demand and their influence is expanding. Increased imports by “teapot” refiners are also driving shifts in China's crude trade patterns. The “teapot” refiners appear to favour Russian oil, perhaps owing to the availability of small spot cargoes and attractive prices. In January-May, total Chinese imports from Russia rose 99% y-o-y to 12.5mt, whilst almost 25% of growth in imports into Shandong was accounted for by Russian crude cargoes. However, Shandong's imports from other regions have also risen firmly so far this year. So, recent regulatory changes in China have had an impact on oil market dynamics and crude trade patterns. “Teapot” refiners, especially in Shandong, have been key in bolstering overall Chinese crude imports this year, and seem set to become increasingly important to trends in Chinese oil trade.**P44**

Europe in transition

Its economy and single market in flux, the continent's transportation market is undergoing a transformation that finally could right the ship. Mark your calendars. Come late September, the container shipping industry—and logistics in general—could be in for one of those landmark events that come along every several years. Like so many times before—dropping of inland intermodal point pricing, launching of ever-larger vessels, slow-steaming, customer service charters and

manifestos—Maersk Group, owner of the world's largest container shipping company, could turn the industry upside-down with a strategic review that has European and global transportation interests buzzing about a possible breakup of the Danish conglomerate. The outcome of that review will come in the wake of a series of events that have decimated European transportation interests struggling with a mix of overcapacity and sluggish demand at sea, in the air, and on the road that is squeezing freight rates and savaging balance sheets. Even Maersk, a paragon of excellence in an otherwise sea of container shipping red over the past five years, has been swept under, reporting a second-quarter loss of \$151 million after a \$507 million profit in the same quarter last year. Kuehne+Nagel is expected to enter the M&A arena at any time, and speculation continues over New York-based Apollo Global Management's plans for Netherlands-based CEVA Logistics. Deutsche Bahn is preparing the groundwork for an IPO of DB Schenker, its successful logistics arm, Maersk might decide to float APM Terminals or opt for a two-way split into a transportation and energy company, and Europe's booming parcel delivery business is bracing for a battle among DHL, UPS and the newly merged FedEx-TNT Express. For now, though, all eyes are on Maersk and what will come out of its strategic review in a month.**P46**

Spreading the word on cyber security

What essential systems do we rely on? It seems quite obvious – defence, public utilities such as the providers of electricity, water and suchlike are surely priorities. Public health and the provision of medicine would generally feature as areas that need to be kept secure against system attacks. But these days so much of our systems are totally dependent upon cyber-based timing and positioning. Banking and credit transfer transactions, even the cash registers in a coffee bar have a vulnerability that comes with its speed and convenience. And what about the whole logistics chain – both domestic and international trade are as “critical” as one could possibly imagine. Ports and ships perhaps do not immediately come to mind as the potential victims of cyber security attacks, possibly because they are rather less understood by the general public and possibly even by those who might do them electronic harm. Ships are only now approaching the sort of connectivity that might make them into a more tempting target. In a world increasingly dependent upon trade, the uninterrupted passage of ships and their efficient interface with ports would appear to justify their identification as exceedingly critical infrastructure. Pirated navigational software has also been identified aboard ships belonging to highly reputable operators and there is limited control over what might be downloaded by irresponsible or just ignorant people. At a seminar last year it was revealed by a specialist working in the offshore market that such was the level of contamination by viruses aboard the units he boarded that on return to shore he would routinely destroy his laptop and purchase a new one! Knowing the enemy, recognising the vulnerabilities and putting in place sensible precautions (all of which are stressed in the Guidelines) might be considered “first steps” in the very important progress to a better understanding of this particular technological risk. **P50** 

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中远（香港）航运有限公司

COSCO (H.K.) SHIPPING CO., LIMITED

中远（香港）航运有限公司是中远海运散货运输有限公司所属的重要骨干企业，拥有约 80 艘近 800 万载重吨船舶，包括灵便型、巴拿马型、好望角型和沿海运输等四支主力船队。公司在国际航运界享有盛名，是国际干散货船舶协会（INTERCARGO）、波罗的海国际航运理事会（BIMCO）、香港船东协会（HKSOA）的主要成员。



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