

# 中国远洋海运

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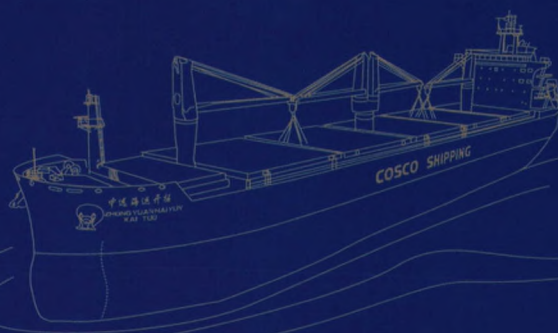
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本期聚焦·航运圆桌：  
疫霾下，寻“机”突破

P28

本期航运圆桌特邀的14位嘉宾，围绕全球疫情危机下航运物流供应链有哪些“机”可寻，如何化“危”为“机”，伺“机”而动，分享了各自精彩的观点，并提出了一些思考与建议。

- 国务院发展研究中心市场经济研究所所长王微：疫情深刻地影响全球价值链、产业链及供应链，也将加速全球物流体系的深刻调整，意味着物流领域更为深刻的全球竞争。
- 波士顿咨询集团（BCG）董事总经理及全球合伙人陈庆麟：航运企业更要做好情景规划，在变化发生之前做到未雨绸缪，之后做到因势利导。
- Seamaster菁英航运董事长季文元：疫情高峰期过后，市场需求会逐步恢复，特别是对大宗商品的需求。航运企业需要对自身的运力布局作出一定的预判和选择，以免错失良机。
- 德路里（Drewry）中国区董事韩宁：今年虽然在行业基本上较为悲观，但是对财务有底气的公司来说是一个逆势扩张的“良机”。
- 香港船东会主席Bjorn Hojgaard：加强香港业界与内地同业的合作，充分利用有关政策特别是粤港澳大湾区发展规划纲要，利用各自优势共同实施国际船舶登记制度、国际航运税收政策，开展航运金融、租赁等业务。
- 中远海运港口有限公司规划研发部黄莉：这场疫情将加速港口运营商的反思，如何增强港口的网络服务能力以更好地吸引客户，带来新的收入增长点，将成为码头运营商下一步关注的焦点。
- 中国船舶工业行业协会产业发展研究中心副主任张琦：建议我国大型航运企业与船舶工业企业加强合作，共同开拓由国家宏观经济政策带来的包括散货船、油船、LNG船和内贸船等在内的市场机遇。
- 广东粤财金融租赁股份有限公司项目经理王永利：面对疫情，打破常规，在“融资”“融物”上尽显专业性才能在行业陷入低迷的时候逆风而行，突破疫局。
- DNV GL海事部中国区总经理科莱：数字化转型升级渡我们化“危”为“机”，DNV GL将继续遵循数字化战略并持续提升服务水准。

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# ABSTRACTS

May 2020

## ***Countries in the global industrial chain are in urgent need of better coordination and cooperation***

A global recession is inevitable given the impact it is having. By economic definition, an economy is in recession if it declines for two consecutive quarters. The formation of the global industrial chain is not in one day. It is a market competition and international division of labor. Many industries need to rely on the formation of human resources, technology, logistics, associated industries and infrastructure, not all places can undertake this industrial chain. In view of this, the author thinks it is unlikely to appear big changes in the short term. There will be a lasting impact on the global supply chain due to the different cycles of outbreaks and recoveries around the world. It is urgent for countries to strengthen policy coordination and cooperation to minimize the negative impact of the COVID-19 on the global industrial chain. **P24**

## ***Shipping Round Table: facing COVID-19, we should try to find opportunities***

With the accelerated spread of the overseas COVID-19, international economic and trade activities are seriously affected, including the shipping industry and the global logistics supply chain which are all facing new challenges. Although it is still not clear to judge the trend of overseas, crisis and opportunity always coexist for the industry, overcoming the crisis is an opportunity. Therefore, we should not only actively respond to the epidemic war, scientific research and judgment, but also be good at capturing and creating opportunities from the immediate crisis and difficulties. The epidemic has accelerated the adjustment of the international transportation pattern and provided unprecedented development space for China's logistics industry. From the perspective of the whole industrial chain, the changes and uncertainties caused by the epidemic also bring opportunities for shipping companies. How to ensure the safety and stability of the shipping chain and expand market share against the trend? How do port operators practice internal skills and seize the window of opportunity? How can the shipbuilding industry utilize the dividends of "new infrastructure" to accelerate the comprehensive application of ship smart technology? How can financial leasing institutions find the right time to seek opportunities in the irregular market fluctuations? The 14 guests specially invited by the shipping round table in this issue have shared their wonderful views and put forward some thoughts and suggestions on how to find out the "opportunities" in the shipping logistics supply chain under the global epidemic crisis and how to turn the "danger" into "opportunity". Wang Wei, director of the Institute of Market Economics at the Development Research Center of the State

Council: the epidemic has profoundly affected the global value chain, industrial chain and supply chain. Chen Qinglin, managing director and global partner of Boston Consulting Group (BCG), who is the head of the transportation and logistics business in greater China and the special leader of the global advantage business: shipping companies should plan their scenarios well, plan for the future before the change happens, and take advantage of the situation after it happens. Han Jun, chief analyst of Transportation in the Research and Development Department of CITIC Construction Investment Co., Ltd.: container carriers can acquire land transportation companies at a lower price when the industry is in a downturn to strengthen the construction of terminal network. In terms of oil transportation, the proportion of long-term lease may be appropriately increased. Bulk shipments still need to be cautious. Ji Wenyuan, chairman of Seamaster Elite Shipping: after the peak of the outbreak, market demand will gradually recover, especially for commodities. Shipping enterprises need to make a certain forecast and choice of their capacity layout so as not to miss the opportunity. Han Ning, China director at Drewry: this year is a 'good opportunity' for financially strong companies to expand against the backdrop of a more pessimistic industry fundamentals. Bjorn Hojgaard, chairman of the Hong Kong Shipowners Association: to strengthen the cooperation between the Hong Kong industry and its mainland counterparts, to make full use of relevant policies, especially the development plan of the Guangdong-Hong Kong-Macao greater bay area, and to make use of their respective advantages to jointly develop such businesses as international ship registration system, international shipping tax, shipping finance and leasing. Chen Feng, general manager of the Marketing Center of COSCO SHIPPING Specialized Carriers Co., Ltd.: always adhere to the concept of "customer-oriented", make every effort to provide stable and high-quality shipping services, and work with customers to tide over difficulties. Huang Li, Planning and R&D Department of COSCO SHIPPING Ports Co., Ltd.: the outbreak will accelerate the rethinking of port operators, such as how to enhance the port's network service capacity to better attract customers and bring new revenue growth, which will become the focus of terminal operators in the next step. Ning Tao, director of the Center for Economic Policy and Development Strategy at the Institute of Water Transportation Science of the Ministry of Transport, said: "it is still difficult to determine the trend of the epidemic. We should not only see the future development opportunities, but also stand in the future and plan for the present." Zhang Qi, deputy director of the Industrial Development Research Center of China Shipbuilding Industry Association, suggested that China's large-scale shipping enterprises strengthen cooperation with shipbuilding enterprises to jointly explore market opportunities brought by the national macroeconomic policy, including bulk carriers, oil

carriers, LNG carriers and domestic trade ships. Wang Yongli, project manager of Guangdong Yuecai Financial Leasing Co., Ltd.: in the face of the epidemic situation, break the routine, show professional characteristics in "financing" and "financing" in order to go against the wind and break through the epidemic situation when the industry is in a downturn. Feng Jiabei, deputy director of Hong Kong Shipowners Association: with the development of telecommunication technology, big data and artificial intelligence, "Smart Ship" will become the future development trend of shipping industry. Eric Kleess, senior vice president, ABS Eastern Hemisphere: in the context of data-centric industry, the operation and regulatory pattern of maritime enterprise will also change. The operation mode will increasingly rely on integrated solutions of network, software and data transmission, and work efficiency will be greatly improved. Kolai, general manager of DNV GL's Maritime Division in China: digital transformation and upgrading will transform "crisis" into "opportunity" for us. DNV GL will continue to follow the digital strategy and continuously improve its service level.

**P28**

***The maritime silk road and the air silk road provides strong support for the sustainable growth of China-EU trade***

With the COVID-19 outbreak under control, trade in goods and air and sea transport between China and the EU is expected to rebound quickly, thanks to the close trade relationship between the two sides and their existing transport by sea and air. In 2019, the two-way trade in goods reached US \$705.29 billion. Among them, sea freight value accounts for 60% and air freight value accounts for 26.9%. In 2019, the China-Europe land-sea express delivered more than 1,000 trains, carrying about 80,000 TEU, and is expected to reach 100,000 TEU by 2020. China and the EU are important trading partners of each other. In 2019, China is the EU's second largest trading partner after the US, while the EU has been China's largest trading partner for 16 consecutive years. Two-way trade in goods reached US \$705.29 billion, or nearly US \$2 billion per day. Convenient, efficient and busy shipping and air transport services provide a huge support for such a large scale of trade between China and the EU. **P50**

***Shipping Market Review and Outlook (Spring 2020 edition)***

Our latest scenario assumes that the outbreak is expected to affect 350m tonnes of seaborne trade and may be further reduced to a low scenario (similar to the 4% decline in 2009). This article from Clarkson research

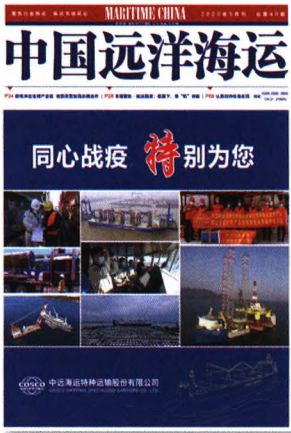
upcoming new shipping market review and outlook report, the report covers the underlying trend of industry, including Clarkson shipping index, global seaborne trade, fuel conversion, supply capacity, environmental protection standard of controllable and shipping finance, etc., but the main content is to analyze the impact of the outbreak of the Covid-19 to shipping. **P52**

***COVID-19 - The importance of contractual clarity***

BIMCO has received numerous enquiries from members uncertain about how the Novel Coronavirus outbreak will impact contracts. The following includes some general remarks, but it is important to evaluate carefully each situation on its own merits. Regarding voyage charter parties, the charterers must, as a starting point, have the cargo ready for shipment as agreed. In the event the cargo is not ready, it will depend on the contractual terms who will bear this risk. Contracts often contain clauses, sometimes in the form of riders, which regulate responsibilities and delays, for example, in the form of a general exceptions clauses or force majeure clauses. **P53**

***Digital business is in the ascendant***

Once the crisis caused by the COVID-19 has come and gone, once economies and trade volumes have recovered from the deep trough they've been plunged into, it's inevitable that the container shipping industry will do even more business digitally. That will include freight transportation, where in just a few months an acceleration in digital adoption is evident due to the impossibility of conducting traditional in-person business. At the same time, the burgeoning array of tools reducing costs by substituting digital for human sales channels, with the added benefit of making the vendor easier for customers to do business with, is becoming more attractive. But while digitalization and significant resulting impact may be inevitable, what that impact will be remains far from clear. It could be the industry evolves as airlines have, with pricing being specific to the customer and changing on a minute-to-minute basis. It could be that e-commerce becomes disruptive, upending what has long been a delicate relationship between carriers and forwarders. **P54**







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