

中国远洋海运

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ISSN 2096-3890

CN 31-2140/U



QK2109321

热烈祝贺博鳌亚洲论坛成立20周年

Congratulations on the 20th Anniversary of the Establishment of the Boao Forum for Asia



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本期聚焦：

链接“十四五” 奋力开新局

P26

新发展格局：经济现代化的路径选择 P28

加快构建双循环相互促进的新发展格局主要包括三方面的战略任务：一是坚持供给侧结构性改革战略方向，牢牢扭住扩大内需战略基点；二是实现科技自立自强，构筑国内大循环的动力源，提升国民经济体系整体效能；三是深化改革开放，在增强发展内生动力的同时，提升国际循环的稳定性，推动国内国际循环相互促进。

在“十四五”规划纲要指导下实现船海产业高质量发展 P34

在打造以国内大循环为主体、国内国际双循环相互促进的新发展格局下，我国开辟海洋装备发展“新赛道”势在必行，而这个“新赛道”的产生，需要颠覆性创新思想，需要在已有技术基础上从市场化、规模化、经济性等方面实现突破。

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建设物流强国的关键是抓好三大任务：一是构建强大、智能、绿色的国家物流系统；二是打造连接世界的全球物流体系；三是推进物流现代化。

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扩大内需将推动成品油、化学品等消费水平逐步向好，炼厂开工率将进一步得到提升，对我国炼化行业发展利好，从而进一步带动我国原油以及成品油运输需求，继而带动全球对能源运输的需求，利好能源运输企业。

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To build an international comprehensive transportation hub city

The international comprehensive transportation hub city is an important starting point for China to build a comprehensive three-dimensional transportation network, and will become the core unit and important node of the construction of China's comprehensive three-dimensional transportation network, which will strongly support the construction of transportation hub clusters, and lead the development of national comprehensive transportation hubs and hub ports. The capacity of China's international comprehensive transportation hub cities has expanded to about 20, with a more reasonable layout, mainly showing three characteristics: first, enhanced transportation hub functions; second, industrial agglomeration has begun to take shape; third, industry and cities are increasingly integrated. Combined with the policy of opening to the outside world in the new stage of development, we should play the role of the core backbone shipping logistics industry in the economic and trade circulation, base on its own industrial chain advantage, actively push forward in the global industrial chain management, strengthen the shipping, ports and logistics business cooperation, grasp the new China's regional economic development opportunity, actively build domestic and international binary channel. **P22**

Focus: strive to open a new situation according to "14th Five-Year Plan"

After the NPC and CPPCC sessions, we have a clearer understanding of the development of shipping logistics in the next five years and even longer. If we take them all together - the 14th Five-Year Plan for the National Economic and Social Development of the People's Republic of China and the Outline of the Long-range Goals to 2035, the Outline of the National Comprehensive Multidimensional Transport Network Plan issued by the State Council of Central Committee of the Communist Party of China in February, the Guiding Opinions on Constructing a New Development Pattern of Services issued by the Ministry of Transport in January, we could come to the conclusion that, China's shipping and logistics are deeply integrated into the domestic and international double cycle, and continue to digital and green transformation. On the internal cycle, shipping logistics will help the cycle scale to expand, cycle costs to continue to reduce, and cycle momentum to continue to strengthen. It can be predicted that the construction of domestic

large circulation infrastructure with the national logistics hub as the center is the main melody of the development of transportation in the "14th Five-Year Plan" and even longer period! The topic has been heating up at this year's NPC and CPPCC sessions. For example, as suggested by the Central Committee of the Taiwan League, we should focus on the construction of four national comprehensive transport hubs in Shanghai, Nanjing, Wuhan and Chongqing, and then select a number of railways, waterways, docks and logistics parks with mature conditions, appropriate scale and strong representation. Representatives and committee members from all over the country also put forward constructive suggestions on breaking through the "blocking points" and linking the "joints" to improve the efficiency of various modes of transportation. In the outer circle, an efficient, economical and reliable shipping and logistics system is the key to promoting China's deeper and wider connectivity to the world. Efforts will be made to build an integrated land-sea combined transport, sea-rail combined transport, China-Europe freight train service model and logistics channel. Among them, the western land and sea new passage is the focus of attention. The Chongqing delegation and others proposed to accelerate the exploration of the "one-bill system" for sea-rail combined transport, promote the international mutual recognition of land and rail bills of lading, promote the use of electronic freight waybills, promote the mutual recognition and traceability of the whole process, and ensure the smooth implementation of the multi-modal transport model. Whether it is internal or external circulation, digitization and greening are the general trend of the development of shipping logistics. Accelerating the establishment of a digital supply chain system, guiding the digital upgrading and transformation of traditional logistics network infrastructure, promoting interconnection, widely applying artificial intelligence, big data, 5G and other technologies, and building a low-carbon, efficient and convenient logistics transportation system have become an important part of the future development blueprint. For the first time, "carbon neutrality" has been included in the government work report. Green logistics is not only the objective requirement of economic and social development, but also the inevitable choice of industry development. For shipping industry chain, collaborative ships, ports and other stakeholders, from the national and industrial level top planning to develop green energy transformation, guide enterprises to accelerate the development of green ship, strengthen the LNG fuel supply and applications, and carry out research on alternative fuels such as ammonia and hydrogen energy, which may become the mainstream of zero-

carbon ship power in the future. This spring, a vision for a new journey is unfolding, and a promise for a better life is drawing closer. In this picture, what are the highlights, points and difficulties to pay attention to? How to interpret and implement accurately? Please look at the expert interpretation of this Focus column, listen to the representatives of the NPC and CPPCC members' aspirations. **P26**

Chinese seaborne trade in 2020: proving robust

While global seaborne trade declined by an estimated 3.6% (-429mt) in 2020 due to impacts from Covid-19, Chinese seaborne trade volumes expanded robustly, growing by 7% last year (+217mt). With the country, already shipping's largest market, seeing a quick economic recovery from Covid-19 disruption early in the year, China's share of global seaborne imports rose further in 2020, to 25%. Chinese seaborne import volumes rose by a sharp 9% in 2020 to 2.9bn tonnes, the fastest pace of growth since 2013, and in major contrast to other importers. Chinese seaborne export volumes fell by 3% to 575mt in 2020, with external demand weak due to Covid-19. However, pressure eased during the year, with volumes down 6% y-o-y in 1H, down 1% in Q3, and up 2% in Q4. So, China's role in the shipping markets proved resilient last year with imports growing rapidly. This strong momentum may ease in the near-term, with China's absorption of 'surplus' cargoes from elsewhere unlikely to match last year's levels in 2021. Underlying longer-term trends (including China's economic transition) are also likely to come back into play at some point. However, while overall Chinese seaborne trade growth may moderate, there is clear scope for significant further expansion in some sectors, and China will continue to shape seaborne demand trends into the long-term. **P58**

US import volume continued to grow in the second quarter

North American importers are beginning to front-load shipments that would normally be sent in the late summer and early fall, solidifying an already bullish outlook for trans-Pacific trade in the second quarter. US retailers lost sales last year when consumer demand exploded faster than their ability to restock shelves, sending freight rates skyward and carrier on-time performance to near-record lows. As a result, some retailers are shipping their back-to-school and holiday-season merchandise earlier this year, which, coupled with shipments held over from the first quarter

due to vessel delays and port congestion, would make the traditional early summer lull not much of a lull at all. Seeming unrelenting North American demand for Asian goods, further fueled by the \$1.9 trillion US federal stimulus package and coupled with nearly maxed-out equipment availability, point to another quarter of near-record import

volumes, freight rates, and logistics constraints, according to forwarders, shippers, and carriers. Industry sources also indicated that the equipment shortages that have slowed container circulation and contributed to congested ports in Asia as well as North America could last past the first half and possibly through the traditional peak season. In conversations with JOC.com, five non-vessel-operating common carriers (NVOs), two industry consultants, and two national retailers said import volumes in the second quarter will remain at or above current levels for at least the next month, soften a bit in May-June, and then increase again as the peak season approaches. **P60**

Analysis of main dry bulk import and export market in Vietnam

Vietnam has basically embarked on an export-oriented rapid development path: foreign investment drives exports, export industry drives other manufacturing industries, and manufacturing industry promotes rapid economic growth. Vietnam has become the world's new manufacturing investment hotspot and will remain so for a long time to come. Clarksons estimates that Vietnam's seaborne imports of iron ore, coal and grain in 2021 will be 12.8 million tons, 60.7 million tons and 17.3 million tons respectively, up 20%, 11% and 4% year on year, respectively. With the rapid economic growth of 6%-7%, the prospect of Vietnam market will continue to improve, and Vietnam market will become one of the revenue growth points for bulk shipowners in the future. The growth in coal cargo traffic in the region has benefited Panamax and Super Panamax bulk carriers. In addition to the surge in coal demand, iron ore imports have been boosted by a strengthening steel industry, providing a steady source of demand for Capesize ships. **P70**





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