

# 中国远洋海运

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## Positioned for trade growth

The proposed Roberts Bank Terminal 2 will deliver  
2.4 million TEUs of new capacity by early 2030s



## 本期前瞻

### 建设低碳/零碳燃料供应链 减少航运业能源转型附加成本 P28

本文基于航运业减排目标、能源需求和政策要求分析低碳/零碳燃料供应链的供应能力,针对满足全生命周期减排要求的低碳/零碳燃料供应能力与航运业未来能源需求之间的矛盾,梳理低碳/零碳燃料供应链的薄弱环节并提出建议。

## 本期话题

### 美国航运改革法 之我见 P38



美国《2022年航运改革法》的具体内容是什么?对美国海运进出口将带来哪些影响?是否真如支持者所宣称的那样可以降低美线运价,从而助力对抗通胀?新法下,航运产业链利益相关者将受到何种冲击?被委以重任的美国联邦海事委员会(FMC)又将扮演怎样的角色?本期话题特邀航运界相关领域的代表参与讨论,以期多层次多视角反映该法对整个航运业带来的影响。

→ **中远海运集团法务与风险管理本部副总经理杨磊:**“通过修法去调整参与各方的权利义务分配,进而实现美国货主利益优先的立法目标,并以此加强对班轮市场运行的控制力。”

→ **交通运输部水运科学研究院副院长贾大山:**“美国的供应链政策价值取向正在从市场与效率优先转向安全与韧性优先,并采取产业政策加大对班轮业的干预力度,保护和促进美国出口贸易,以重塑全球供应链。”

→ **中国船东协会常务副会长张守国:**“只有加强船货双方的沟通与合作,才能真正有效缓解当前美国海上供应链的瓶颈问题。”

→ **德路里供应链总监Philip Damas:**“对于托运人而言,美国的这些法律变化带来的影响甚微,仅限于滞期费和滞港费方面。”

→ **国际航运公会航运政策经理Helio Vincente:**“疫情以前所未有的方式扰乱了供应链,而新出台的美国海运改革法案试图通过打击航运业来解决这一问题实非明智之举。”

→ **致远航运洛杉矶总代表章华峰:**“新法的出台无法实现其降低美线运价的意图,运价最终还是由供需关系决定的。”

→ **上海海事大学教授、海商法研究中心主任胡正良:**“我国基本航运政策大致定型,政府航运市场监管体制和机制基本成熟,为加快制定‘航运法’提供了现实基础。”

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## ***"Danger" and "opportunity" of global economy in the era of high inflation***

Inflation is the same accelerating train that carries the world economy down a deep tunnel into the future, and it has serious consequences. Emerging market countries are likely to face the dilemma of falling domestic asset prices, currency depreciation against the dollar and euro, and rising foreign currency debt pressure, which will eventually lead to a currency crisis and a larger economic shock. The developing countries in the middle and lower reaches of the industrial chain, who have given priority to products processing and manufacturing, while facing the increased cost of raw materials, on the other side because of the intense international competition and limited bargaining power, are unable to realize rapid rise along with the cost of product prices and thus, bear the risk of loss of orders, also face rising prices and lead to earnings uncertainty. The fundamental solution is that we need to maintain steady and relatively fast economic growth and strengthen the resilience and vitality of the Chinese economy with sound development fundamentals, and we should strengthen diversified energy import policies and seek more energy import partners, reduce the dependence of China's economic growth and industrial development on imported bulk commodities. **P24**



## ***Building a low-carbon/zero-carbon fuel supply chain to reduce additional costs of energy transformation in the shipping industry***

In order to break the supply bottleneck and promote the large-scale application of low-carbon/zero-carbon fuels, the supply capacity can be gradually improved from the following three aspects: first, improve the low-carbon/zero-carbon fuel preparation process, establish green preparation plants, realize the large-scale fuel production that meets the carbon emission requirements of the whole life cycle, and guarantee the emission reduction and energy demand of the shipping industry. Second, according to the future development needs of the shipping industry, the ports should gradually improve the infrastructure of low-carbon/zero-carbon fuel storage and refueling, and establish a complete network of low-carbon/zero-carbon fuel storage and refueling in batches. The third is to establish a standard and legal system for low carbon/zero carbon fuel refuelling, fill in the supervision gap of low carbon/zero carbon fuel refuelling on water, and ensure the safety of ship refuelling. **P28**





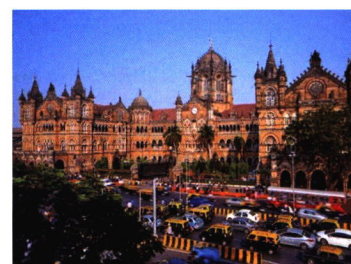
## ***Large passage of coastal water transport calls for high-quality domestic trade container transport***

The great coastal waterway runs through the developed coastal areas of China, and has always been a great channel for domestic cargo transportation as well as a connecting belt for foreign trade transportation. The big channel can not only connect with inland areas through the Yangtze River and Xijiang River, but also connect with foreign countries through coastal ports. It has outstanding comparative advantages of large transport capacity, low cost, safety and reliability, green environmental protection and coping with emergencies. In 2020, coastal ports handled 9.48 billion tons of cargo, of which domestic trade was 5.48 billion tons. Domestic shipping routes in coastal ports handled 93.54 million TEUs, with an average growth rate of 5.8% in the past two years. Unimpeded passage, sufficient transport capacity and low cost will help to reduce the cost and increase the efficiency of the domestic major cycle. Rapid container transport between coastal ports, with "Sea-high-speed FAST" as the typical case, is developing rapidly. Compared with traditional shipping, this mode has stronger timeliness and more efficient logistics operation. The connotation of "FAST" is Freight, Accuracy, Saving and Team, which represents a new benchmark for China's domestic trade container port and shipping services. PANHUB platform can provide pan-Asian shipping of the national coastal rich route products, Yangtze River, Pearl River, etc., but also cover the railway, highway transportation services, electronic container, cargo tracking, trailer services and other additional services. **P34**



## ***BRICS cooperation has ushered in a new era of global development***

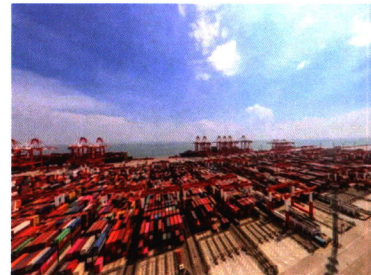
In a century of profound changes, the epidemic has repeatedly hindered the strong recovery of the world economy, and geopolitical conflicts and sanctions have further exacerbated the division of the world. The BRICS countries are important partners in the construction of "Belt and Road Initiative". As developing countries and emerging economies of multilateral cooperation platform, the BRICS cooperation always adheres to the spirit of the BRICS of open, inclusive and win-win cooperation complied with the development trend of world multi-polarization and helps to promote global governance system change. In the face of new challenges posed by instability, uncertainty and insecurity in the international situation, BRICS countries have become indispensable and important participants in global governance and a new driving force for the continuous improvement of global governance. From January to May



in 2022, the total bilateral trade between China and BRICS countries reached us \$250.1 billion, up about 16% year on year.**P58**

## ***Chinese seaborne trade: facing headwinds?***

Against a backdrop of an evolving and gradually maturing economy, the outlook for Chinese seaborne trade growth has been dampened recently by the impacts of Covid lockdowns and building economic headwinds. Total Chinese seaborne imports are now projected to decline slightly this year, while export growth is expected to stall after a firm "post-Covid" rebound in 2021. Let's take a closer look... Chinese seaborne exports are projected to remain broadly flat this year, following firm 10% growth in 2021. Containerised cargo exports are expected to see limited c.2% growth (2021: +16%) as a range of factors e.g. macroeconomic headwinds (including from the Russia-Ukraine conflict), inflationary pressure on consumers in key markets, impacts from Chinese lockdowns on manufacturing (Chinese industrial production down 3% y-o-y in April) and shifts in consumer spending back towards services. So, Chinese seaborne trade currently seems to be facing some headwinds. However, there could still be some upside from stimulus or energy policies later this year, while the depreciation of the yuan and potential for changes to US import tariffs could also impact. Given China's role as shipping's largest market, closely tracking the trends will remain important.**P60**



## ***About trans-Pacific freight trend***

The coming two months will reveal just how much US importers are pulling back on orders from Asia, and the degree to which container lines can adjust capacity as easing vessel space on some trades pulls down spot rates. Forwarders say they expect a bump in spot rates in the coming weeks when an anticipated early peak season ripples into the trade beginning in late June. But the scale of the rate increase and length of the peak season are unclear, as some shippers are pulling back or even canceling orders, while others are front-loading cargo. However, the number of orders for Asian imports to the US and Canada has been steadily rising since February and into May. The number of orders in May jumped to nearly 150,000, the highest monthly volume of new orders since November 2021, according to Infor Nexus, a global network platform for direct procurement, origin order management, multimodal freight management, and trade finance services. The spot rate from Shanghai to Los Angeles at the beginning of June was \$8,704 per FEU, basically unchanged from the previous two weeks but 46 percent higher than June 2021, according to the Drewry World Container Index. The spot rate from Shanghai to New York at the same time was \$10,871 per FEU, also flat with the previous two weeks but up 44 percent from a year ago.**P62**





## ***What happened at MEPC 78?***

At MEPC 78 (the IMO's Marine Environment Protection Committee's 78th meeting), the IMO approved a proposal to designate the Mediterranean Sea as a Particularly Sensitive Sea Area (PSSA) - in other words an area that needs special protection. This is because sulphur oxide (SOx) emissions and particulate matter from shipping damage the health of people living in the region. The PSSA will create an Emission Control Area (ECA) restricting ships to using fuel with a sulphur content of 0.10 % or less. This will be the fourth internationally agreed ECA to introduce this limit. The other three ECAs cover sea areas around the United States, Canada and the US Caribbean Sea, the Baltic Sea and the North Sea. There was initially some concern about suitable fuel being available in the region, but it was agreed that availability had not been an issue in the existing ECAs. Another issue of concern, shared by BIMCO, was that some Mediterranean Member States are not parties to MARPOL Annex VI, which is the regulation implementing the ECA. BIMCO firmly believes that the effective application of international regulation depends on swift and broad ratification and uniform implementation by states. Watertight doors for oil tankers: Regulation 28 in Chapter 4 in MARPOL Annex I has been replaced and the amendment will enter into force on 1 January 2024. The amendment has also been reflected in the IBC Code and approved by the IMO's Maritime Safety Committee (MSC 105). Amendments to Appendix I of MARPOL Annex II related to the abbreviated legend of the GESAMP Hazard Evaluation Procedure were adopted. The tables in Appendix I on "Guidelines for the categorization of noxious liquid substances" will be replaced by updated data. These amendments will enter into force on 1 November 2023. **P64**



## ***The impact of the latest policies of major refining and chemical provinces on the energy transportation industry***

In terms of provincial energy refining rankings, the top three are Shandong, Liaoning and Zhejiang respectively. Shandong province continues to eliminate backward production capacity, connect the upstream and downstream of the refining and chemical industry chain, and consolidate the position of the first refining and chemical province in China; Liaoning province focuses on promoting the transformation of "fuel type" refineries to "chemical type" and promoting the construction of large-scale integrated projects. Zhejiang province focuses on building a complete industrial chain from petroleum refining to basic chemical raw materials, new chemical materials, high-end special chemicals. Energy transportation enterprises should pay close attention to national policy trends, consider developing new energy transportation business, and actively explore the possibility of cooperation with low-carbon projects in major refining and chemical provinces. **P66**







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