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“Putting it All Together - The Chinese Shipowners' Perspective”

Mr. Terence Zhao, President - Singhai Marine Services

Terence Zhao: The people sitting next to me are Chinese shipowner representatives. Since 2014, the growth rate of our Chinese fleet has been about 34%. Last year, we have surpassed Japan and become the second largest fleet owner in the world. The distance between us and the first largest fleet owner country, Greece, is gradually shortening. Let's me introduce all the members of our team. Mr. Xu Tinghui, Deputy Director of China of Merchants Group Aviation Planning Office. Mr. Zheng Yanbing, Manager of Revenue Management Department of COSCO Ocean Bulk Transportation Co., Ltd., Mr. Li Duozhu, Chairman of Shanghai of Dingheng Shipping Group, Mr. Su Bin, CEO of Shandong Ocean Energy Co., Ltd., Mr. Fu Jian, Deputy General Manager of Shandong Shipping. I am very pleased to invite you to participate in our discussions. China is now facing a very good development opportunity. In particular, the One Belt and One Road plan has brought development opportunities to our Chinese shipowners. Of course, there are many difficulties and challenges. My first question is to invite everyone to talk about the difficulties and challenges, opportunities and threats you are facing in the shipping market. Our time is very limited. Please briefly summary your answers. First, I would like to invite Mr. Xu Tinghui to share your opinion.

Xu Tinghui: Thank you, moderator. Hello everyone. Our China Merchants Shipping business has oil, bulk, gas, and special sectors. My general feeling is that the current shipping market is still growing at a low level, but the fundamentals are getting better. Regarding to our shipping company, we feel that there are challenges, opportunities, and expectations. In the long run, it seems that there is no such a technology to help us grow strongly. But in the short term, fundamentals are improving, so we should be both cautious and optimistic in oil and bulk cargo sectors in the second half of this year. From the perspective of development opportunities, there are many risks and uncertainties in the international trade and politics, but people still have optimism in China. The Belt and Road Initiative and the supply-side reform are our development opportunities. We are also actively following up and working hard in these areas. As a shipping company, we are committed to providing valuable service to customers around the world, particularly our Chinese customers. Thank you.

Terence Zhao: Thank you, Mr. Xu Tinghui. Now welcome Mr. Zheng Yanbing for speaking.

Zheng Yanbing: Good afternoon everyone. I am from the Income Management Department of COSCO Ocean Bulk Transportation Co., Ltd. Our company is a joint venture company of Zhongyuan Group and Zhonghai Group. It was established on June 16, 2016 and is headquartered in Guangzhou. Our company has the world's largest fleet size. We currently have more than 400 ships, including VLOC ship, Capesize ship, Panamax ship, and Handysize ship. We have more than 10 million tons freight volume for each ship type. Our company's annual freight volume reaches to more than 350 million tons. Our main routes are distributed all over the world. The main routes in the world are our routes. The major ports in the world are the ports operated by our ships. Our company hopes to better serve our shippers in the future. For the opportunities of the future development in the dry bulk market, I have several points to share with you. First, our dry bulk industry market is related to the global economic development. The global economic development level will determine the future direction of our industry. I like to study history, especially the global economic history. From the global economic history and the perspective of development, the development pattern of the global economy has produced very important changes. From the formerly developed countries to a multi-polar competition, we can see the developed countries represented by the United States from World War II to the 1980s, leading the development of the global economy. However, since the beginning of reform and opening in the 1980s, China's rise has greatly changed the pattern of global economic development. With the rise of other developing countries in India and Southeast Asia, the global economy has been turning into a multi-polar development. My judgment is that this multi-polar development will make the global economic growth more stable and the growth cycle will be more sustainable. Second, countries have taken infrastructure construction as a major means of stimulating economic growth. The United States is planning a \$2 trillion investment in infrastructure. China is a well-known infrastructure country. India and other Southeast Asian countries will continue to industrialize by investing infrastructure first in the future. Infrastructure construction has great benefits for our dry bulk industry. It will lead to a large increased need for iron ore, building materials and other bulk commodities in the future. I believe that the dry bulk market is facing a good demand in the middle of this century. In terms of steel growth, we are very pleased to see that in the past three years, dry bulk cargo has grown at a low rate of 5%, especially last year, only 3%. This year is estimated to be an increase of around 3%. In 2017 and 2018, the BDI index has risen for two years. I think this year's BDI index may be equivalent to last year, and in the next two or three years, BDI is likely to reach a level of mutual profit. I want to remind the shipowners to develop rationally, we should avoid the failure of over-development in the past few years which leads to imbalance and a downturn in the market. In this case our industry can develop healthier.

Terence Zhao: Thank you Mr. Zheng for sharing. Next welcome Mr. Li Duozhu to talk about his ideas and opinions.

Mr. Li Duozhu: Good afternoon everyone. I think the market in the short term is pessimism. The reasons are not clear, but I have been optimistic every year for the past ten years, but the results told me that they were all pessimistic, so now I am basically pessimistic. In the medium term, I am more pessimistic. The medium term is after eight years. I am thinking about the whole shipping industry. What kind of business is still alive, what kind of enterprise is dead. Why I said eight years, because two years ago I was in a public speech and I said after ten years, now two years have passed, and there are still eight years left. But today's words are the same as two years ago. After eight years, the entire shipping industry is probably an Internet company. The future shipping company is an IT company. If you can't do this, your company will dead. This is a certain point of my view. What is an IT company? After eight years, the ship will be highly intelligent, and the crew will be about three to five people. The company's management must be data management, the current human resources will be reduced by 70%, so the cost will be reduced by 30%. Due to intelligent ship and data management, the entire management is subversively improved, so companies who prepare for this in advance will grow and develop rapidly. People may not believe when I made this speech two years ago. At that time, the occasion was quite formal. A group of experts organized by the China Development Bank to give advices to the Shanghai government. Everyone went to talk freely. I suggested that if the Shanghai Municipal Government wants to build a shipping center, it is best to start researching on intelligent ships and the construction of a shipping company's data management platform. Two years have passed, I think the government may not pay much attention to it, but a lot of changes have taken place in these two years. Many of our smart ships have already begun to deliver. Because of my prediction, we started preparing for it two years ago. I have the first intelligent chemical tanker in the world. It will start construction within three months. I spent two years designing. This ship currently has eight people, and it will be reduced to three to five people three years later. At present, our design has been completed. It is jointly developed by CSIC and China Shipbuilding Co., Ltd. My company will start to use data management platform. After three years, our data management platform will be fully launched. After the launch, the company's management will be automated. We hope to use IT technology and ideas in ship management to achieve a substantial increase in the overall management quality in the future, to significantly reduce costs, improve efficiency and competitiveness. After eight years, we can continue to live. Thank you.

Terence Zhao: Mr. Li has moved on very fast and his ideas are very advanced. Thank you very much for sharing. Next, welcome Mr. Su Bin to speak.

Mr. Su Bin: First, I would like to thank the host for providing us with such a good platform for everyone to exchange views. Shandong Ocean Energy is a new company affiliated to Shandong Ocean Group. The positioning is the development of clean energy supply chain. We have fleet, meanwhile, we do

international trade. In the development of the entire gas energy industry chain, our company's entire industrial chain is extending. As a shipowner, if there is no cooperation between the upstream and downstream of the industrial chain, we feel that the competitive pressure is very large. So, we integrate all of assets together. We integrate ocean transportation, terminal storage, and international trade. This is our strategic development orientation. It is very gratifying to see that the company's entire warehousing trade and shipping are perfectly integrated. The second is the overall view of the future shipping industry. Mr. Xu is more optimistic about the future market. Mr. Li is more pessimistic about the future market. The benevolent sees benevolence, the wise sees wisdom, everyone's views may be different. I have been working in the shipping industry for many years. I have a neutral attitude toward the future. The global economic slowdown and the increase of trade barriers will have a negative impact on the future development of the shipping industry, but we are also delighted to see some new developments. LNG, LPG, and the future LEG, these new gas clean energies are on the rise. I think the shipping market will always advance ahead, but what are the new growth points in the future may need our thinking. Thirdly, the future market competition in the gas field will be very fierce, because the current shipowners are no longer the shipowners in the traditional sense. Many charterers, we call the shippers, are now developing the fleet. Like the fleet is developing trade business, everyone wants to lengthen their competitive chain. Unlike bulk cargo, container and cruise market, gas energy is a small market segment. For a relatively small market segments, whether it is the entry threshold of the market, the technical threshold of the future, or the threshold of funds, the competition is not as fierce as bulk cargo and containers, but with the evolution of shippers, the continuous delivery of new shipbuilding, the future competition is also very challenge. The fourth point is I hope to see a variety of financial institutions on the platform of Capital Link in the future. Whether it is a bank or a financial leasing company, Shandong Ocean Energy is very willing to cooperate with you and use some tools and platforms to push Chinese clean energy development to a new height. Well, I will stop talking from here. Thank you very much.

Terence Zhao: Thank you, Mr. Su. Now we have Mr. Fu Jian.

Mr. Fu Jian: A lot of thanks to the organizers for giving us this opportunity to express our views. I am from Shandong Shipping, and I am also affiliated to Shandong Ocean Group. We are also a new company. We were unveiled in 2010 and has been developed for less than ten years. The challenges encountered during this period are also relatively large. We are facing a tough market like everyone. After the establishment of the company, the market has been declining. However, after nearly ten years of development, we have approximately 62 ships. From the scale of development situation, our confidence in the market is also growing, and the perception of the market is gradually changing. I am both optimistic and cautious. Why optimistic? We are not only increasing the size of the fleet every year;

our customer base is getting larger and larger. Customers increasingly trust us and give us stronger support. Another aspect of my optimism, I am happy to see that our upstream and downstream industries can sit together today to discuss the shipping market and how to cooperate and develop. This means the mode of development is changing, and the concept of common development is developing. If everyone can have a win-win thinking, sitting together and communicating and cooperating in the development of shipping, I believe that this market will be more orderly and healthier.

Terence Zhao: Thank you, Mr. Fu. Because of the time limit, I will ask some of the issues that everyone is paying attention to. Today, at Beijing time 12:01PM, the US tariff on China's goods has increased from 10% to 25%. Our Deputy Prime Minister is still negotiating in the United States. In the end, it is possible to reach an agreement. It is not ruled out that no agreement can be reached. We know that after the Sino-US trade war broke out, it will have a great impact on all industries in the world. I think the impact on our shipping industry will be very high. To what extent this impact can be, what measures can be taken, I would like to invite the General Manager of China Merchants Bureau to talk about your views.

Mr. Xu: This is a big problem. If we refer to our conventional experience, the growth rate of the world economy, the growth rate of trade, and the growth rate of the shipping industry have a relatively proportional relationship. If the conflict of Sino-US trade happens, the most direct impact is the volume of trade, and the second impact is the ship-to-island shipping volume. The impact on different market segments is different. We think the most direct one is the container market, but the container market also has a change in the market. For example, the United States needs a certain commodity in China. During the trade war, the United States does not import directly from China, instead it imports through a third country. The container was originally a direct transportation, but now it has become a sector of united transportation. So, in terms of transportation volume, there will be a possibility of change. If the trade war is escalated, the impact on the shipping market will be inevitable, but it is still difficult to determine, and it will change over time, thank you.

Terence Zhao: Thank you very much for sharing. My next question will give to Mr. Fu Jian. The first few sections of our forum discussed some impacts of the new rules on our shipping, like ballast water, low sulfur emissions, and decarbonization. How do you plan to develop your fleet to meet the requirements of the new rules? What impact will they have on our shipping market?

Mr. Fu Jian: At today's meeting, some experts have a very deep understanding on this topic. Our company has also done a very serious research on various situations. My views basically are very similar to everyone. The new rules' impact is certain. In such a short period of time, we must meet the requirements. The situations faced by different companies are different. In addition, the shipping

market is not very prosperous in these years, but Shandong Shipping is a newly established company. We pay a high attention to these new rules. We believe that enterprises must assume social responsibilities. We attach great importance to environmental protection and firmly support it. We must be responsible for the next generation. In the past few years, when company had ability to invest, we always invested in the environmental protection. No matter how difficult we are, we must respect and comply with the requirements of the convention. Our new ships and second-hand ships are all arranged in advance in energy conservation and emission reduction. Let me give you an example, we have the first electronic installation system on bulk cargo ship which got approval of the Ministry of Transport. It is the demonstration vessel of the Ministry of Transport in the bulk cargo field. We have made specific arrangements for each type of ship. Although the implementation time is getting closer, the pressure we feel is getting lower.

Terence Zhao: Thank you, Mr. Fu. My last question wants to leave for Mr. Li because Mr. Li is very special among our five guests. Our other four guests are from large state-owned enterprises. Mr. Li is a very typical representative of private shipowners. Private shipowners have always encountered relatively large difficulties in financing. Mr. Li just mentioned a plan to develop smart ships. I believe there will be more demand for funds. In this regard, I would like to ask Mr. Li to share your plan.

Mr. Li: Everything has its advantages and disadvantages. If you are ready, bad things may become good things. If you are not prepared enough, it may become a worse thing. We began to predict this trend three or four years ago, including the consideration for the future after ten years. We want to use intelligent management to significantly reduce labor costs. Labor costs are more and more expensive. After ten years, the crews are hardly found. We must use intelligence to replace people. This is one aspect of preparation, and there is another aspect of preparation. In fact, three years ago, our ship design was systematically considering energy saving. Compared with the existing ships, in the current situation, our new ships save more than 20% fuel. If the low-sulfur oil regulations are implemented, the oil price will rise, and we can probably save more than 30%. In this case, we have obvious advantages in the market. This advantage is enough to make others unable to compete. In a market, when you can live, you can get big market opportunities. With big market opportunities, you can get big development. The bigger the development, the bigger the scale, the stronger your competitiveness. This is my conclusion. The strong will get stronger, the big will get bigger. Last year, we had a plan for building a hundred ships. There may be more than one hundred, we want to build 300 ships. I blow my own horn a little, what if it came true?

Terence Zhao: Mr. Li seems to be not short of money. The questions I asked just now have been avoided.

Mr. Li: There is too much money to say, to be honest, 100 billion.

Terence Zhao: (laugh) Time is up. We have important programs later. Thanks to the five guests for sharing. Thanks to the listeners.

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“纵观全局-中国船东的视角”

赵玮先生 (森海海事服务公司董事总经理兼论坛联合主席)

赵玮先生: 今天坐在我旁边的这一个小组都是中国船东，从 2014 年开始我们中国的船队的增长速度大概是 34%，去年我们已经超过了日本，已经成为了全球第二大船队，和第一大船东国希腊的距离逐渐缩短，今天我们请到的中国船东比较有代表性，接下来请我一一介绍一下我们小组的成员，招商局集团航筹办副主任徐挺惠先生，中远海运散货运输有限公司收益管理部经理郑演兵先生，上海鼎衡船务集团董事长李多珠先生，山东海洋能源有限公司首席执行官粟斌先生，山东海运副总经理付健先生，非常高兴能够邀请中国船东代表参与我们的讨论。中国现在赶上了一个非常好的发展机遇，尤其是一带一路计划给我们中国船东带来了发展机会，当然发展机会也充满了很多困难和挑战，今天，我的第一个问题想请我们在座的各位代表谈一谈您所在的市场所面临的困难和挑战，机遇和威胁，我们小组时间比较有限，请各位回答问题的时候尽可能地讲一些要点，首先我想请徐挺惠先生来分享一下你的看法。

徐挺惠: 谢谢主持人，各位同行大家好，我们招商局的航运业务，目前有油，散，气，特，刚才主持人讲我们怎么看细分市场，今天早上我们也听了有关专家的一些分析，总体的感觉是目前的航运市场还在低位增长，但是基本面在趋向好转，从我们船公司来讲，感觉到有挑战，有机遇，也有期待，从长期来讲好像还没有强有力的帮助长期增长的技术，但是短期来看，基本面在好转，所以今年下半年在油运和散货方面我们觉得要谨慎乐观，从发展机遇上讲，尽管国际贸易和政治都有很多风险和不确定性，但中国还是被世人所看好的，一带一路计划和供给侧改革都是我们的发展机遇，我们在这些方面也在积极的跟进和努力，作为船公司，致力于为世界各地的客户，特别是我们中国客户提供更有价值的服务，谢谢。

赵玮先生: 谢谢徐挺惠先生，接下来请郑演兵先生。

郑演兵先生：各位同仁，下午好，我来自中远海运散货运输有限公司收益管理部，我们公司是中原集团和中海集团合资重组的公司，于2016年6月16日成立，总部在广州，我们公司拥有全球第一的船队规模，目前拥有400多艘船舶，包括矿砂船VLOC，好望角型船Capesize，巴拿马Panamax型船，灵便型Handysize船，各个船种我们都有超过千万吨的运抵规模，我们公司的年货运量达到3.5亿吨以上，主要航线分布于全球，全球各个主要航线都是我们的航线，全球各个主要港口都是我们船舶营运的港口，我们公司也希望将来能更好地为货主提供服务，至于谈到干散货市场未来发展的机遇，我有这么几个观点跟大家分享，第一，我们干散货行业市场与全球整体经济发展相关联，全球整体经济的发展水平将决定我们行业未来的走向，我自己比较喜欢研究历史，特别是全球经济史，那么从全球经济史的发展来看，全球经济的发展格局已经产生很重要的变化，从之前发达国家一家独强，到现在是多极竞争的局面，我们可以看出从二战到80年代，以美国为代表的发达国家主导全球经济的发展，自从上个世纪80年代中国开始改革开放以后，中国的崛起已经极大改变了全球经济发展的格局，未来随着印度和东南亚一带其他发展中国家的崛起，全球经济将从以前的一极独强转变为多极发展，我的判断是，这种多极发展会使全球经济增长更加平稳，增长的周期持续性更加强。第二个，各国纷纷将基础设施建设作为拉动经济增长的一个主要手段，美国正在酝酿两万亿美元基础建设投资，中国是众所周知的基建大国，印度，以及其他东南亚国家将来实行工业化，也是从基础建设入手，基础设施建设对我们干散货行业有很大好处，将来会导致铁矿石，建材等大宗商品大幅度增长，我判断本世纪上中叶，干散货市场都面临一个很好的需求的增长周期，从钢铁方面来看，我们很欣喜地看到最近三年，干散货都是在5%一下低速地增长，特别是去年只有3%，今年估计也是3%左右的一个增长，这样的话就极大地改善了之前运抵快速发展所造成地运抵供需不平衡从而导致市场极度低迷的一个状况，2017和2018年，BDI指数连升了两年，我认为今年的BDI指数可能会跟去年相当，并且未来两三年，BDI有可能达到一个共同盈利的水平。我想要提醒各位船东，理性发展，我们不能重蹈前几年过度发展导致失衡带来低迷市场的教训，让我们的行业发展地更加健康。

赵玮先生：谢谢郑先生的分享，有请李多珠先生谈谈您的观念和看法。

李总：各位领导，大家下午好，关于市场的看法，短期，本人表示悲观，理由也说不清楚，因为过去十年我每一年都是乐观，但是结果告诉我都是悲观，所以现在开始就基本上悲观了。中期，更悲观，所谓中期，我叫八年以后，大概整个航运业态是什么样的，什么样的企业还活着，什么样的企业已经死了，为什么讲八年，因为两年之前我在一个公众场合演讲说过十年，现在减掉两年，还剩八年，但今天讲的话跟两年以前是一样的，八年以后整个的航运业态可能就是互联网企业，未来的航运公司就是IT企业，如果做不到这一点，基本上是必死无疑，这是我个人一个比较确定的观点，那么什么叫IT企业，八年以后，船舶将会实现高度智能化程度，船员大概三到五个人，公司的管理一定是数据化管理，目前的人力资源会减少70%，因此成本会下降30%，由于船舶的智能化和数据化的管理带来的整个管理颠覆性地改进，使得拥有这个技术和提前做好这个准备的公司会发展壮大，而且会快速发展壮大，这一块在两年前我做这个演讲的时候可能没人会相信，当时那个场合还是挺正式的，国家开发银行组织的一批专家们，为上海市政府建言献策，大家去畅所欲言，我当时提出个建议，如果上海市政府要搞航运中心建设，最好要开始智能化船舶

的研究以及航运公司数据化管理平台的建设，这两年过去了，我想政府可能也没有高度重视，但是这两年发生了很多的变化，我们的很多智能船已经开始交船了，因为我这种判断，两年之前我们也开始做准备，我是做化学品运输的，全球第一条智能化化学品船将在三个月之内开工建造，我用了两年时间进行设计，这个船目前我们的配员大概是八个人，三年以后实现三到五个人，目前我们的设计已经完成，和中船重工和中国船型社联合开发的，公司的管理将开始数据化的管理，三年之后我们数据化管理平台会全面上线，上线以后，公司的管理会进行自动化的管理，在区块链等方面做一系列最先进的管理，我们希望在船舶管理方面，用IT技术和理念，实现未来整个管理的大幅度提升，大幅度降低成本，提高效率，提高竞争力，然后八年以后，我们还能继续活着，谢谢大家。

赵玮先生：李总走得很快，思路也很超前，非常感谢分享，接下来请栗斌先生。

栗斌先生：首先非常感谢主持方给我们提供一个这么好的平台让大家交流观点看法，山东海洋能源是一个新公司，隶属于山东海洋集团，定位是清洁能源供应链的发展，目前公司下属有船队，同时我们也做国际贸易，在整个气体能源产业链的发展上，我们公司的整个产业链在延伸，作为一个船东，如果没有产业链上游和下游的配合，我们感到竞争压力非常大，所以我们就把整个这一块资产全部整合在一起，我们从远洋运输，到码头仓储，到国际贸易，只要我们能拥有的工具，我们都把它整合起来，这是我们的一个战略发展定位，现在非常欣喜地看到，公司整个仓储贸易和船运都在非常完美地结合。第二个是对未来航运业总体的观点，刚才徐总对未来市场比较乐观，李总对未来市场比较悲观，仁者见仁，智者见智，每个人的观点可能不一样，我个人从事航运业很多年，个人对未来持中性的态度，因为随着全球经济的放缓，贸易壁垒的增加，对未来航运业的发展肯定会带来负面影响，但是我们同时也欣喜地看到一些新方面的发展，LNG,LPG,和未来的LEG,这些新型气体清洁能源在兴起，我觉得航运市场总会超前发展，但是未来新的增长点在哪里，可能需要我们的思考。第三个，我们所从事的气体领域的未来市场竞争会非常激烈，因为现在的船东已经不是以前传统意义上的船东了，很多租船人，我们叫货主，现在也在发展船队，像船队也在发展贸易业务一样，大家都想把竞争的产业拉长，气体能源是一个很小的细分市场，不像散货，集装箱和邮轮市场容量那么大，对于一个相对偏小的细分市场来说，不管是市场的进入门槛，未来的技术门槛，还是资金门槛，竞争没有散货和集装箱那么激烈，但是随着货主的演变，新造船的不断交付，未来的竞争也是非常有挑战性。第四点希望在Capital Link的平台上见到各种各样的金融机构，不管是银行，还是金融租赁公司，山东海洋能源非常愿意跟大家一起合作，利用大家的一些工具和平台，共同把中国清洁能源的事业推向一个新的高度，好了我先说这么多，非常感谢。

赵玮先生：谢谢栗总，有请付健先生。

付健先生：感谢主办方给我们这个机会来发表我们的观点，我来自山东海运，也是隶属于山东海洋集团，我们也是一个新公司，2010年揭的牌，到现在不到十年的发展时间，这期间遇到的挑战也比较大，我们和大家一样也面临着一个比较艰难的市场，公司成立之后市场就一直下滑，但是经过近十年的发展，我们船队规模差不多是62艘，从发展规模情况来看，我们对市场的信心也是越来越大，对市场的看法也逐渐发生变化，我持乐观谨慎看法，为什么乐观，我们每年不光船队规模在增大，我们客户越来越多，客户对我们的信任也越来越大，对我们支持的力度也越来越大，所以说我们乐观的有基础。我乐观的另一个方面，我感觉到我们上下游行业今天能坐在一起共同探讨航运市场，共同探讨怎么合作，怎么发展，发展的模式在改变，共同发展这个理念在改变，如果大家能本着共赢的思想，坐在一起交流，为航运发展共同商量对策，我就相信这个市场会更加有秩序，更加健康。

赵玮先生：谢谢付总，由于时间关系，我就问一些大家都比较关注的焦点问题，今天中午北京时间12点零一分美国对我们中国的商品关税从10%提高到25%，我们的副总理还在美国谈判，最终也有可能达成协议，也不排除不能达成协议，我们知道中美贸易战爆发以后，对全球所有行业的冲击都很大，尤其我想对我们航运这一块冲击会非常直接，这个冲击能到什么程度，如何采取一些措施，请招商局徐总谈谈您的看法。

徐总：这个问题很大，就我们常规的经验来看，世界经济的增长速度，贸易的增长速度，与航运业的增长速度，有一个相对的比例关系，中美贸易如果真的发生冲突，影响最直接的就是贸易量，然后是船到岛的航运运输量，这个是必然的也是不可避免的，对不同的细分市场影响有所不同，我们认为最直接的，就是集装箱市场，但是集装箱市场也有一个转变，比如说，美国需要中国的某一个商品，贸易战了以后，美国不直接从中国进口，而是通过第三国去进口，集装箱本来是直达运输，现在变成了区段的联合运输，所以从运输量来讲，会有转变的可能，贸易战如果爆发升级，对航运市场的影响是必然的，但影响有多大现在还难以确定，随着时间的推移会有所转换，谢谢。

赵玮先生：非常感谢徐总的分享。我的下一个问题回到付总。我们论坛前几个板块讨论到新规则对我们航运的一些影响，像压载水，低硫排放，还有脱碳，您是如何计划让自己的船队发展符合新规则的要求，这些新规则对我们航运市场会产生哪些影响。

付总：今天会议上，有一些专家说的非常好，认识也非常深，我们公司也做了非常认真的研究和各项情况的安排，我和大家的观点基本上非常相似，新规则对行业的冲击是一定的，这么短的时间内我们要达到要求，各公司面临的情况也不一样，再加上这些年来航运市场不是很景气，但是山东海运是新成立的公司，我们对新法规非常重视，我们认为企业要承担社会责任，我们对环保高度重视并且坚决拥护，我们要为下一代负责，这些年来，只要公司有能力和我们就在这方面投入，我认为面对新公约的要求，不管我们有多大的困难，我们都要尊重并符合公约的要求，我们

的新船也好，二手船也好，都在节能减排上提前进行安排，我举一个例子，我们有交通运输部批准的第一艘散货方面安装电的系统，是交通运输部在散货领域的示范船，我们对不同的船型做了具体的安排，虽然实施的时间越来越近，我们感觉到的压力也越来越轻。

赵玮先生：谢谢付总，由于时间关系，我最后一个问题想留给我们的李总，因为李总在我们五位嘉宾里面是比较特别的，我们其他四位嘉宾都来自大型国企，李总是民营船东一个非常典型的代表，民营船东历来在融资上会遇到比较大的困难，尤其是李总刚才谈到要发展智能船舶的一个计划，我相信对资金方面肯定有更多的需求，这方面我想请李总分享一下，您是怎么计划的。

李总：任何事情都有利有弊，你要是准备好了，坏事可能就会变成好事，准备不充分可能坏事就变成更坏的事，这一块我们在三四年之前对方方面面就有所预测，包括对十年以后的事情我们也开始考虑，用智能化管理大幅度降低人工成本，人工成本越来越贵，再过十年，船员都找不着了，不得不用智能化去替代人，这是一个方面的准备，还有一个方面的准备，实际上我们在船舶建造方面，三年之前我们的设计就在节能这一块做了非常全面系统的考虑，我们同样的船，而且是新造船，比现有船，在目前情况下，节油 20%多，如果低硫油法规实施的话，油价上涨，我们大概可以节能百分之三十多，所以这样的话在市场当中我们就有了明显的优势，这样的优势足以让别人都没法做了，你还能活下去，在一个市场当中，当你有机会活下去的时候，你就能在一个阶段获得大的市场机会，有了大的市场机会，你就可以获得大的发展，发展越大，规模效益越大，你的竞争力越强，这就是我后面的结论，强者恒强，大者恒大，但前提是，预则立不预则废，去年我们有一个百船计划，可能要超过一百条，要奔着 300 条去了，大概就是这个规划，牛逼吹的大了一点，万一实现了呢。

赵玮先生：李总看来是不缺钱啊，刚才我问的问题都避开了。

李总：缺的钱太多，没法回答，1000 亿。

赵玮先生：哈哈，我们的时间已经到了，下面还有重要节目，感谢五位嘉宾分享，感谢各位。