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C.I.A.N.A.M.
Cámara Interamericana de Asociaciones Nacionales de Agentes Marítimos

NEWSLETTER Nº 15

Special General Meeting CIANAM
Cancún – México

A Special General Meeting of the Inter-American Chamber of Shipping Agent National Associations (CIANAM) took place within the framework of the 49th Annual Meeting of the Federation of National Associations of Ship Brokers and Agents (Fonasba) celebrated this year in Cancún, Quintana Roo.

With the presence of their President Elsa Gamarra of the Asociación de Agentes

Marítimos del Paraguay, the delegates discussed issues related to the organization of the Chamber, measures to strengthen international trade and to facilitate the operations related to it.

The members present analyzed the measures aimed at the simplification of document management, as an essential tool for the logistics chain of which the

Contents

CIANAM
www.cianam.org

Secretary:

Centro de Navegación

TE: (54 11) 4394-0520

Maritime Agent is a fundamental actor.

It was established that the next assembly will be organized by the Asociación Peruana de Agentes Marítimos on April 5th and 6th.

AMANAC welcomes shipping leaders at the Fonasba meeting

18 Oct, 2018 Redacción T21 0 Comentarios

Business work in cargo management throughout the world **is essential to deliver products and consumer goods to millions of households**, maintaining a high efficiency in benefit of the country's cost.

Mexico is a market that moves about **6.5 million 20-foot containers (TEU) annually through the ports**, so its important strengthening the maritime sector in events that analyze the challenges and opportunities for efficient commercial exchange, said **Asociación Mexicana de Agentes Navieros (Amanac).**

This Association is part of and has built a relationship with national and international business organizations such as **The Federation of National Associations of Ship Brokers and Agents** (Fonasba, for its acronym in English), which this year celebrates its **49th Annual Meeting in Cancun, Quintana Roo.**

The agenda of the meeting is focused on strengthening international trade, w**here shipping companies specializing in the transporting specialized cargo** meet, the documentation of products, as well as the role of ports in the supply chain.

On the eve of the 49th Annual Meeting that takes place for the first time in Mexico, Adrián Aguayo Terán, president of Amanac, pointed out that the shipping industry is a community in continuous growth and Fonasba's purpose, since its creation, has been to join forces to face challenges produced by maritime trade.

"In this spirit, the conferences and activities scheduled for our meeting are intended to share the latest developments and innovations in our field, as well as to ask questions and propose answers about the current challenges we face," Aguayo Terán said through a statement released by Amanac.

During the opening ceremony, Fernando Gamboa, General Director of Port Development and Administration, of the **Ministry of Communications and Transport**, pointed out that 80% of world trade moves by sea, being Mexico a logistics platform of excellence with 11.122 kilometers of coastline, which locates this country as the natural entrance with the largest oceans in the world.

Founded in 1969, FONASBA, chaired by J. A. Foord FICS **promotes fair and equitable practices and ensures that the needs of our members are understood at international, regional and individual national level across the maritime industry.**

In addition, it has consultative status with the **International Maritime Organization (IMO),** the **United Nations Conference on Trade and Development (UNCTAD)** and the **World Customs Organization (WCO)**, in addition to working closely with ship owners such as Bimco, Intercargo and Intertanko

ASOCIACION DE NAVIEROS DE GUATEMALA

The National Port Commission of Guatemala (CPN) and the Inter-American Ports Commission (CIP) of the Organization of American States (OAS) are organizing the thirteenth edition of the MARITIME PORT CONGRESS.

The high-level international event, unique in its kind, will be held at the Westin Camino Real hotel in Guatemala City on November 19 and 20, 2018. It will offer a space for discussion, updating, projection and commercial exchange in the port and maritime sector. The participation of the public and private sector, authorities of entities and companies related to maritime foreign trade is expected. The National Port Commission (CPN) carried out the course: "Operational of the International Maritime Trade and International Trade Terms"

The National Port Commission (CPN) with the support of the Central American Commission of Maritime Transport COCATRAM, gave the course "Operational of the International Maritime Trade and International Trade Terms" on the 11 and 12 of September 2018 within the Annual Program of Port Training 2018. The course was aimed at executives and technicians from the Port Community of the country.

The objective of the course was to provide extensive knowledge in the different components, processes and operational requirements of the International Maritime Trade and the logistics chain for the movement of goods at international level, as well as the different loading platforms, types of transport and importance of the more favorable and safe port facilities for merchandise, among other current aspects of interest.

National Port Commission (CPN) and Galileo University successfully carried out the "Port Maritime University Seminar" aimed at students at the Master's level in International Trade Management and Customs and Degree in Customs Administration and International Trade

The CPN as a technical institution and adviser of the National Port System of Guatemala, seeks to improve the competitiveness of foreign trade by sea through these types of academic events and encourages them to continue participating in this type of activity.

NEW BOARD OF DIRECTORS
ASOCIACION DE NAVIEROS DE GUATEMALA

We are pleased to inform you that in the Ordinary General Assembly of Associates held on August 31 of this year, the new Board of Directors of the Asociación de Navieros de Guatemala -ASONAV- was elected for the period 2018-2020, which is integrated as follows:

President:	Elieser Jose Castellanos Debourg
First Vicepresident:	Adolfo Ernesto Rudeke Brin
Second Vicepresident:	José Juan Mayén Rigalt
Secretary:	Roberto Papadopolo Mora
Treasurer:	Úrzula del Carmen González Arias
First Board Member:	Hans Erich Robert Wagner Petersen
Second Board Memeber:	Luis Alberto Paiz Rivera
Third Board Member:	Luis Ricardo Quezada Mejía
Fourth Board Memeber:	Sven Heino Rose Oestee

Investments and Efficiency in Ports

The commercial exchange through Chilean ports shows a sustained growth over time, which requires us to be attentive as an industry and thus ensure the conditions to facilitate and enhance international maritime trade.

To analyze the competitiveness of Chile in this matter, the Cámara Marítima y Portuaria (CAMPORT) wrote the report "Investments and Efficiency in Ports", which you can review here: download

En términos de infraestructura, se advierte que existen holguras importantes de capacidad en los puertos chilenos. Sin embargo, resulta prioritario definir una agenda público – privada orientada a ganar eficiencias de corto y mediano plazo en el sistema marítimo portuario, con el fin de aprovechar las inversiones realizadas.

III Congress on Security in Logistics Chain 11/10/18

III Congress of Security of Goods in the Logistics Chain took place with great success in the Crown Plaza Corobicí conference room in the city of San José with an attendance of more than 300 participants including sponsors, exhibitors, special guests and different Chambers related.

Conferences were held with different topics related to container theft and contamination with the assistance of Public Safety Minister, Mr. Mickel Soto, Mr. Pedro Berirute General Manager Foreign Trade Promoter, Mr. Carlos Fuentes Commercial Manager APM Terminals, Mr. Juan Carlos Mora Operations Manager of Sociedad Portuaria Caldera, Mr. Edgardo González President of NAVE and international exhibitors who were in charge of different presentations with the related topics among them:

- Ensuring the continuity of operations in the supply chain; threats and risks.
- International Code for the Protection of Ships and Port Facilities (ISPS)
- Securing of the Goods

- Panel of Experts: transformation of ports in Costa Rica

Inauguration of Refrigerated Patio & Equipment in Puerto Caldera

Our Chamber participated in the inauguration held by Sociedad Portuaria Puerto Caldera (SPC) with the participation of the President of the Republic Mr. Carlos Alvarado Quesada, the First Lady Mrs. Claudia Dobles Camargo, Executive President of INCOP Mr. Juan Ramón Ribera Rodríguez, Minister of Foreign Trade Mrs. Dyala Jiménez Figueres, Chairman SAAM Mr. Oscar Hasbún M. and General Manager SPC Mr. Ricardo Ospina among other special guests.

Centro de Navegación
ARGENTINA

Centro de Navegación was recognized for supporting the fight against corruption in Ports

Together with the Maritime Anti-Corruption Network, Senasa and other institutions of the sector, they managed to reduce by 90% the reports of illegal incidents in the inspection of bulk carriers.

The Centro de Navegación, a century-old institution that represents Argentine shipping agencies, and other institutions in the sector, were recognized by the Maritime Anti-Corruption Network (MACN), thanks to the joint work they carried out together with Senasa to fight corruption in the vessel clearance process for loading grain and by-products

We're pleased to inform you that the Maritime Anti Corruption Network (MACN) has congratulated to Senasa Authorities for their work and efforts to achieve an over 90% reduction in unjustified rejections during Cargo Holds / Tanks inspection.

The Maritime Anti-Corruption Network recently sent a letter to Senasa Authorities, acknowledging that the incidents of corruption reported in the Anonymous Incident Reporting system decreased by 90% during the last year. The Centro de Navegación is mentioned in this letter as one of the entities that worked towards achieving that goal.

This achievement is the result of two years of coordination between the State (Ministry of Agribusiness and Senasa) and the Maritime Anti-corruption Network, represented in Argentina by its local partner Governance Latam; the Chamber of Control Companies of the Argentine Republic (CADECRA), the Centro de Navegación, the Cereal Exporters Center (CEC) and the Chamber of the Oil Industry of the Argentine Republic (CIARA).

Prior to the implementation of the new program, the Centro de Navegación interacted on several occasions with the authorities of Senasa, presenting the inconveniences that appeared in this activity, requesting that measures should be taken in this regard and adopting procedures to avoid inconveniences generated in the inspections.

The project to develop and implement a new system of inspections, where public and private organizations are articulated, began by MACN interviewing more than 40 shipowners, ship agents, inspectors, customs lawyers, grain representatives, etc. They took information from each of the actors involved in this issue.

The new control scheme is in line with the evolution of world trade, digitilizing tanks and holds inspections of the bulk carriers. It also establishes a cross-check system that promotes integrity and transparency.

In this way, practices such as discretionary and anachronistic inspections that continued to be made on paper were left behind.

"In times when the word corruption is read daily and floods in the different communication channels, we are proud to be part of a collective action of public and private entities, which have achieved something almost unprecedented in our country: lowering corruption in a very high percentage, with the conviction of eradicating it by working on simple processes and using the latest technology," said Julio Delfino, president of the Center de Navegación.

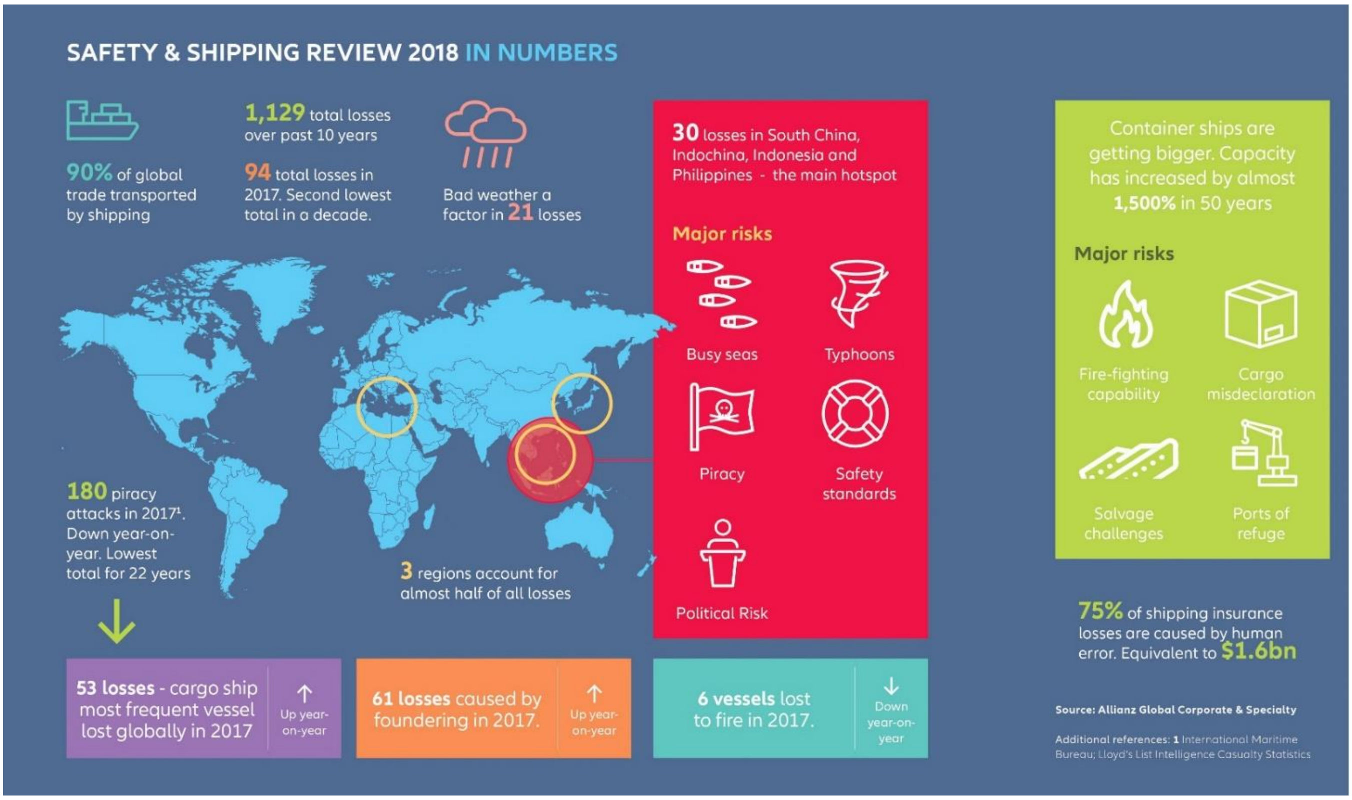
AMANAC
ASOCIACION MEXICANA DE AGENTES NAVIEROS A.C.

XXIV Annual Shipping Agents Congress

With more than 30 years promoting maritime and port development, as well as foreign trade, the Asociación Mexicana de Agentes Navieros (AMANAC) celebrated the 24th edition of the Annual Shipping Agents Congress in Los Cabos, Baja California, Mexico.

The event brought together the most specialized exponents of the maritime and port sector, so they could share their experiences with attendees to strengthen one of the most robust activities in the logistics chain in which foreign trade moves.

It was assisted by maritime agencies, port terminals, service providers, port and naval authorities, and economic agents.



Por qué baja el movimiento de contenedores en los puertos de todo el mundo

Emiliano Galli 12 de Octubre 2018

VALPARAÍSO, Chile. El análisis de la economía mundial y el comercio de contenedores podría resumirse en una frase: “Veníamos bien, pero pasaron cosas”.

“El año pasado fue bueno para el comercio en comparación con años anteriores. Estados Unidos tuvo una expansión de su economía y creció el consumo de países desarrollados. Todos pensamos que 2018 sería un año nuevamente bueno, pero el proceso no fue tan lineal”, explicó el economista marítimo Ricardo Sánchez, y oficial senior a cargo de la División de Recursos Naturales e Infraestructura de la Cepal.

Sánchez confirmó que es un hecho la tendencia que señalaba una reducción del crecimiento del comercio exterior (y el movimiento de contenedores) respecto del crecimiento de la economía: mientras en el pasado, por cada punto (1%) que crecía una economía su comercio exterior lo hacía tres veces más (3%), ese multiplicador se está reduciendo a una relación de 1 sobre 2, o incluso 1/1.
Los factores que presionan a la baja el *troughput* sobre la actividad económica, según Sánchez, son los siguientes:

- El impacto del proteccionismo.
- La reprimarización de la economía: estamos exportando e importando menos que en 2000.

- La revigorización de las alianzas marítimas.
- La saturación en la penetración del contenedor.
- El achicamiento de los bienes: para el mismo nivel de comercio, se requieren menos contenedores porque los bienes son más chicos y más livianos.
- La progresiva reducción en la cantidad de transbordos: a igual comercio en 2012 y 2017, en el año pasado se requirieron menos transbordos.
- Un mejor aprovechamiento de los contenedores grandes (a igual comercio se requieren menos contenedores).
- La deslocalización de las actividades industriales.

En una de las ponencias de la 107° Convención Anual de la Asociación Americana de Autoridades Portuarias (AAPA, en inglés), Sánchez explicó que el mundo "no termina de recuperarse del todo de la crisis económica", y que persiste un estado de "alta volatilidad e incertidumbre" que marcan una desaceleración de las tasas de crecimiento global que este año cerrará en 3,9% y algo similar en 2019.

Economía, comercio y contenedores

Ricardo Sánchez, economista marítimo de Cepal

"El comercio global en tanto crecerá un 4,4%, y en 2019 lo hará en un nivel cercano al 4%. Pero la incertidumbre continúa en niveles importantes", acotó.

Respecto del movimiento de contenedores (comercio marítimo), señaló que se pasó de un 2,3% de crecimiento en 2015 a un 5,1% este año. "Pero una actualización de las previsiones del desarrollo comercial muestran una declinación de la tasa del crecimiento", dijo Sánchez, respecto de la desaceleración de los movimientos en puertos.

Se trata del "multiplicador" que remite a la relación de crecimiento del movimiento de contenedores en relación con el crecimiento de la economía (PBI sobre movimiento de contenedores). "En la fase previa a la crisis, la relación entre lo que pasaba en la economía y los puertos era de casi 3,5% o 4% (de crecimiento portuario) por cada punto de crecimiento del PBI", explicó Sánchez.

"Este multiplicador pasó a casi un 2,16% (*throughput* sobre actividad económica) por cada 1% de crecimiento de la economía", destacó.

En la década anterior, cuando se hacían proyecciones portuarias se previsionaba que si la economía crecía al 3% anual, los puertos lo harían a una tasa de entre el 10 o el 15 por ciento. "Este proceso quedó en el pasado", sentenció.

La sola reducción en la cantidad de transbordos, en puertos de todo el mundo, implicó una reducción de 18 millones de contenedores en un año: "Esto equivale a que hay un 3% menos de actividad en contenedores sólo por la reducción en los transbordos", concluyó Sánchez.

El mercado de combustible marítimo: desafíos y oportunidades

Estudio multicliente de Alphatanker sobre regulación OMI 2020
22 de Octubre de 2018

"Estamos a casi un año de la que podría ser potencialmente la disrupción más significativa para los mercados de transporte marítimo y de bunkers en toda una generación – la introducción del límite de 0,5% de emisiones de sulfuros", lee el reporte **The Marine Fuel Market: Challenges and Opportunities** de **Alphatanker**, el cual apunta a lo que será la entrada en vigor de la regulación OMI al 1 de enero de 2020.

Andrew Wilson, Jefe de Investigación de Energías en Barry Rogliano Salles (BRS) shipbroker en París, Francia y principal autor del reporte, comentó en exclusiva a **MundoMaritimo** sobre las principales incertidumbres frente al inminente cambio regulatorio que afectará a toda la flota marítima.

El documento se enfoca en cuatro principales temas sobre el límite de sulfuros de la OMI. Primero está la incertidumbre regulatoria respecto de cómo será impuesta la nueva normativa. *"Creo que muchos podrían 'hacer trampa'. No creo que suceda en grandes países, como Estados Unidos o China, pero sí podría ocurrir que pequeños países no cumplan del todo con la regulación*", comenta Wilson, aunque resalta que BRS ve un cumplimiento general de la normativa por sobre el 90%.

La tecnología se verá enfrentada a la nueva regulación también. Según Wilson, los avances tecnológicos tardarán algunos años en alcanzar el nivel técnico requerido por la regulación. "*Los únicos confiados en la tecnología son los fabricantes de depuradores, por lo que los armadores no tienen ninguna certeza sobre cómo estos equipos se comportarán en el tiempo, considerando corrosión y demás factores*".

Sin embargo, el tema más grande para los dueños de embarcaciones será la disponibilidad de combustible y los precios. "*Habrá combustible, pero será caro. El gasoil marino podría llegar a costar US$900 p/t (actualmente US$520 p/t), lo cual podría ser un aumento significativo. También hay un tema respecto de si se podrá o no hacer búnker con HSFO. Tengo bajas expectativas respecto de los ULS/VLS disponibles dentro del margen de 0,5%. Este tipo de combustibles deberá luchar por ganar participación de mercado. Es un nuevo tipo de combustible y apenas un puñado de embarcaciones lo está probando, pero los armadores no saben qué esperar. Este tipo de combustible será un producto muy mezclado y no hay una estandarización o predicción de comportamiento en motores o incluso de su disponibilidad. El combustible marítimo continuará estando disponible en todos lados, pero las refinerías no estandarizarán el producto*", comenta.

Para el caso de **Latinoamérica**, las refinerías locales tendrán dificultades para producir combustibles bajos en sulfuros. *"Esperamos que la demanda global de gasoil sea mayor a la oferta en 2 millones de barriles diarios, por lo que cuando se tiene una situación como ésta se tiene un gran impacto de precio. Se va a tratar de destilados y un aumento de precios generalizado. En Latinoamérica se verá un aumento del precio del diésel e incluso una baja en gasolina*", añade.

El futuro en GNL

GNL se ve como la mejor solución en el largo plazo, pero no alcanzará a generar cambios para la regulación OMI 2020. *"Todo apunta a que se convertirá en el combustible bunker de preferencia para toda la flota mundial. Es más limpio*", dice **Wilson**.

Por MundoMaritimo

Panama Canal Sets New Annual Tonnage Record in 2018

October 31, 2018 by gCaptain

The Panama Canal has set a new annual record for the total amount of tonnage that passed through the waterway over the course a fiscal year, recording a total tonnage 442.1 million Panama Canal tons (PC/UMS) in FY 2018.

This amounts to a 9.5 percent increase compared to 2017, when 403.8 million PC/UMS passed through the Canal. The figure also surpasses forecasted estimates and obviously sets a new record in the 104-year history of the waterway.

“The Panama Canal continues to exceed our expectations, reinforcing every day the importance of the waterway’s expansion and its impact on global maritime trade,” said Panama Canal Administrator Jorge L. Quijano. “This is the results of the efforts of our committed workforce who made this an extraordinary year.”

The Panama Canal Authority said the increase was driven by the transit of liquefied petroleum gas (LPG) and natural liquefied gas (LNG) carriers, containerships, chemical tankers and vehicle carriers.

During FY 2018, the Panama Canal increased the total available booking slots to eight daily for its Neopanamax Locks, offering more flexibility and efficiency to customers choosing the route.

Panama Canal’s Performance by Segment

The container segment continued to be the leading market segment for tonnage through the Canal, accounting for 159 million PC/UMS tons of the total cargo, including 112.6 million PC/UMS tons that transited the Expanded Canal, or approximately 70 percent.

Tankers, which include liquefied petroleum gas (LPG) and liquefied natural gas (LNG) carriers, were the second leading market segment with 130.3 million PC/UMS tons.

The next leading segments included bulk carriers, at 73.7 million PC/UMS tons, and vehicle carriers at 49.5 million PC/UMS tons.

Panama Canal’s Main Users and Routes

In terms of cargo tonnage, the main routes using the Panama Canal in FY 2018 were between Asia and the U.S. East Coast, the West Coast of South America and the U.S. East Coast, the West Coast of South America and Europe, the West Coast of Central America and the U.S. East Coast and intercoastal South America.

The main users during FY 2018 were United States, China, Mexico, Chile and Japan.

Meanwhile, a total of 62.8 percent of the total cargo transiting the Canal had its origin or destination in the United States, according to the Panama Canal Authority.

The Panama Canal’s 2018 Fiscal Year began on October 1, 2017, and ended on September 30, 2018.

Qué pueden hacer los puertos para mitigar el cambio climático

Por Emiliano Galli18 abril, 2018Sin Comentarios

Luego del histórico acuerdo logrado por la Organización Marítima Internacional (OMI) la semana última, que compromete a la industria del transporte naviero a reducir paulatinamente sus emisiones de carbono hacia 2050 (de por lo menos el 50%), el Foro Internacional del Transporte (ITF, en inglés) de la Organización para la Cooperación Económica y el Desarrollo (OCDE, en inglés), publicó un nuevo informe que le pasa la pelota a **los puertos: qué pueden hacer estos actores para contribuir con la reducción de gases de efecto invernadero.**

El informe **"Reduciendo las emisiones de gases contaminantes en el shipping: lecciones de incentivos portuarios"**, presentado hoy en Ginebra, sigue al paper de marzo que fue base para la discusión en la OMI y resume aquellas iniciativas que los distintos puertos de todo el mundo tomaron para atacar el cambio climático, como por ejemplo "tarifas ambientales" o reducciones de tasas en función de las emisiones de los buques recalados.

Destaca, entre los 100 puertos con medidas de esta naturaleza, al **Puerto de Buenos Aires, que adhirió al Índice Ambiental de Buques (ESI, en inglés) y al "Premio Verde" (Green Award)**, por lo que otorga descuentos de entre 5 y 10 por ciento a la tasa de buques y cruceros según un puntaje acordado internacionalmente, tal como señala la resolución 50/2017, firmada por **Gonzalo Mórtola,** interventor de la Administración General de Puertos (AGP), dependiente del Ministerio de Transporte.

El informe del ITF forma parte del programa “Descarbonización del Transporte”, y fue escrito y dirigido por el especialista en puertos, shipping y logística de la OCDE, **Olaf Merk.**

“**Las emisiones de gases de efecto invernadero por parte del shipping representan el 2,6% del total global, pero esta participación podría más que triplicarse hacia 2050** si no se toman medidas que ayuden a acelerar la transición en el sector”, señala Merk en la síntesis ejecutiva del trabajo.

“Muchas de las medidas para mitigar el cambio climático se concentran en el diseño de los buques y en sus operaciones. No obstante, **los puertos juegan también un rol crucial** para facilitar la reducción de estas emisiones”, agrega el especialista.

El trabajo identifica sobre todo los incentivos económicos que los puertos ofrecen, y pueden ofrecer a la industria naviera, y evalúa su impacto. Analiza asimismo de qué manera las estas iniciativas portuarias pueden ayudar en las negociaciones con los actores marítimos.

Descubrimientos

El incentivo financiero más común adoptado por una gran parte de los puertos se refiere a las “tasas ambientales diferenciadas”. Ya existen en al menos 28 de los 100 puertos más importantes en términos de volumen operado (toneladas) y contenedores movdos (medidos en TEU).

“En la práctica, vemos una reducción de las tarifas que los puertos cobran a aquellos buques amigables con el medio ambiente, que **se basan en un índice ad hoc o se remiten a características particulares de los buques”**, explica el trabajo.

Por ejemplo, la Autoridad del Canal de Panamá (ACP), otorga **prioridad de atraque a los buques “más verdes”**. España, por su parte, incluye parámetros medioambientales en las licitaciones o licencias otorgadas a los **servicios de remolque en puerto**. En tanto que Shanghai (China), tiene un esquema que sopesa **nivel de emisiones y volumen de comercio** en el cabotaje marítimo.

“A pesar de lo promisorio de estas iniciativas, **todavía es poco lo que se conoce de su verdadero impacto**. La información pública respecto de cuántos buques cumplen con estos esquemas es escasa, y no hay aún ningún puerto que haya demostrado la reducción de las emisiones de gas de efecto invernadero como resultado de las políticas económicas y ambientales adoptadas”, advierte el ITF.

No obstante, destacan que **el dato más certero es el que aporta el complejo portuario de Los Ángeles y Long Beach, en Estados Unidos, que instrumentó un esquema de reducción de velocidad en los barcos que se acercan al puerto, para reducir así la contaminación.**

Mucho por recorrer

Para el departamento de Transporte de la OCDE, todavía es bajo el número de puertos con iniciativas que favorezcan le reducción de emisiones. Y donde existen, **son “pocos los barcos que se benefician con estos incentivos: menos del 5%”**, destaca el informe presentado hoy en Ginebra, Suiza.

“Es más, **la diferencia en las tarifas entre buques limpios y contaminantes es baja**: ronda entre el 5 y el 20 por ciento”, subrayan.

A pesar de felicitar las medidas adoptadas por los puertos que lideran la avanzada ambiental, el organismo que trabaja por la “descarbonización del shipping” **duda de que los puertos sean hoy realmente “un factor (de ahorro ponderable) que estimule a los armadores a construir buques más amigables con el medio ambiente**“.

“Sin embargo, puenden ayudar en la transición. La primera lección que arrojan estos incentivos económicos es que **los puertos están asumiendo su rol**“, indica el ITF, tras agregar que estas medidas adoptadas por los puertos “permiten deducir que se necesitan intervenciones de mercado para una operación más limpia”.

El equipo de la OCDE arriesga más aún: no sólo incentivar con reducciones de tarifas, sino que **sugiere "tarifas más caras" bajo la premisa "el que más contamina, paga más"**. No obstante, reconocen que mientras muchas autoridades portuarias son propensas a subsidiar a los barcos verdes, también son "esquivas" a aplicar tarifas ambientales diferenciadas que castiguen a los buques "más sucios".

Operating costs in shipping to increase over 2018 and 2019

Vessel operating costs in the shipping industry are expected to increase by 2.7% in 2018 and by 3.1% in 2019, according to Moore Stephens's latest survey, 'Future Operating Costs Survey'.

Finance | 29/10/18

Drydocking is the cost category likely to increase most significantly in both 2018 and 2019, followed by repairs and maintenance. Specifically, the cost of drydocking is expected to rise by 2.1% in 2018 and by 2.3% in 2019, while expenditure on repairs and maintenance is predicted to increase by 2.0% in 2018 and by 2.3% in 2019.

Expenditure for lubricants will also increase by 1.9% in 2018 and 2.1% in 2019, while increases in spares will be at 1.9% and 2.2% in the two years under review, and for stores are 1.6% and 1.9% respectively.

In addition, the survey showed that the outlay on crew wages will increase by 1.3% in 2018 and by 1.9% in 2019, with other crew costs likely to go up by 1.5% in 2018 and by 1.8% in 2019.

What is more,hull and machinery insurance cost will go up by 1.3% and 1.6% in 2018 and 2019 respectively, while for protection and indemnity insurance the increases are expected at 1.2% and 1.4% respectively. In the meantime, management fees will probably increase by 1.0% in 2018, and by 1.2% in 2019.

The overall cost increases were the highest in the offshore sector again, averaging 4.1% and 4.2% respectively for 2018 and 2019. On the other hand, cost increases in the bulk carrier sector were 1.8% and 2.6% for the corresponding years.

Additionally, operating costs for tankers are expected to increase by 2.4% in 2018, and by 2.9% the following year, while the respective figures for container ships are 4.2% and 3.8%.

As for the reasons that will lead to the higher costs, respondents focused on many areas of concern, with regulation being high on the list, with one respondent noting.

Furthermore, fuel costs were also another major cause, as they are expected to rise over the next two years, especially ahead of the 2020 sulphur cap.

Respondents were also concerned about environmental issues, trade wars, the cost of securing finance, and the global economic recession, all of which are thought to be able to increase operating costs.

However, the cost of new regulation is believed to be the most influential factor affecting operating costs over the next 12 months, at 23%, up from equal third place at 15% last year. 18% of respondents placed finance costs in second place, down from 20% and first place last year, while competition ranked in third place at 15% as it had last year. Finally, crew supply reduced to 12% compared to 19% and second place in last year's survey.

Richard Greiner, Partner, Shipping and Transport, stated:

The predicted 2.7% and 3.1% increases in operating costs for 2018 and 2019 respectively compare to an average fall in actual operating costs in 2017 of 1.3% across all main ship types recorded in the recent Op Cost study.

IMB: 156 piracy incidents reported in the first nine months of 2018

The ICC International Maritime Bureau's (IMB) Piracy Reporting Centre (PRC) reported a total of 156 incidents of piracy and armed robbery against ships in the first nine months of 2018 compared to 121 for the same period in 2017.

29/10/18

These incidents can be broken down as following:

- 107 vessels boarded;
- 32 attempted attacks;
- 13 vessels fired upon;
- 4 vessels hijacked.

However, no vessels were reported as hijacked in the third quarter of 2018, marking the first time since 1994 when no vessel hijackings have been reported in two consecutive quarters.

Nevertheless, incidents of this crime remain, with the number of crew members held hostage increasing, compared with the same period in 2017—from 80 incidents to 112 by the third quarter of 2018.

Credit: IMB

Pottengal Mukundan, Director of IMB, stated:

While the record low number of hijackings in the second and third quarters of 2018 is of course to be celebrated, incidents of maritime piracy and armed robbery remain common

Piracy trends in the Gulf of Guinea

The Gulf of Guinea accounts for 57 of the 156 reported incidents. Most of these incidents have been reported in and around Nigeria (41), and there has also been a noticeable increase in the number of vessels boarded at the Takoradi anchorage, in Ghana.

In addition, 37 of the 39 crew kidnappings for ransom globally have taken place in the Gulf of Guinea region, in seven separate incidents. A total of 29 crew members were kidnapped in four separate incidents off Nigeria, including a 12-crew kidnapping from a bulk carrier off Bonny Island, Nigeria in September 2018.

Moreover, no new incidents have been reported off the coast of Somalia in the third quarter of 2018, while two fishermen were reported kidnapped off Semporna, Malaysia in September 2018. Incidents in the remaining regions include border on low-level opportunistic theft.

Types of ships attacked

As far as what kind of vessels were attacked, IMB reported the following:

- 56 tankers attacked;
- 51 bulk carriers attacked;
- 13 container ships;
- 36 other.

Commenting on the above, IMB called masters and crew members to be vigilant and report all incidents to the 24-hour manned PRC.

Opinion: Winners and Losers From a Sea Change in Oil

October 29, 2018 by Bloomberg

By Liam Denning (Bloomberg Opinion) — Despite efforts by the Trump administration to turn it, a supertanker is bearing down on drivers, oil majors, and even Amazon.com Inc.

We are 14 months away from a shake-up in the global oil market lacking the drama of, say, Iranian sanctions. It involves a UN-mandated crackdown on air pollution from ships. Still awake? Good, because this could mean some serious disruption.

Ships consume about 3.8 million barrels a day of fuel oil — heavy, lower-value stuff from the refining process that contains about 1 to 3.5 percent sulfur, according to Wood Mackenzie, a consultancy. From January 2020, new rules from the International Maritime Organization will limit sulfur-dioxide emissions from ships. All else equal, a ship would need to burn fuel with only 0.5 percent sulfur content or less to comply.

There are other ways to deal with the regulations. One is to install “scrubbers,” which effectively wash the nasties into the sea rather than let them spew into the air. Those are expensive, however. Speaking on an earnings call last week, the CEO of Wartsila Oyj, a Finnish company that’s big in the scrubbers game, indicated only a tiny fraction of vessels will likely have installed them by 2020. Another option is running on liquefied natural gas, but that only makes sense for new ships, not retrofits. Sailing more slowly, which is more fuel efficient, can also work up to a point. Or ship-owners can just chance it and not comply.

Most, however, will have to switch from high-sulfur fuel oil to a lower-sulfur diesel or gasoil. How big that swap will be is the big question; estimates I've seen range roughly from 1.5 to 2.5 million barrels a day. In a 28 million-barrels-a-day diesel market, that may not seem like much. But here's a chart of demand growth for diesel over the years:

While fuel-oil prices would tank, the price of low-sulfur diesel would, all else equal, jump. That's a problem for truckers — like the ones ferrying Amazon's goodies around — for whom fuel has fluctuated between roughly 20 to 40 percent of the cost-per-mile over the past decade.

This explains why President Trump, who has been antsy about gasoline prices ahead of midterms, might want to slow the IMO's roll in 2020 (when there happens to be another somewhat important U.S. election). However, since the U.S. effectively agreed to the rules a decade ago via an act of Congress, delaying or thwarting them isn't a simple process.

And the IMO 2020 rules are a potential winner for an important segment of the U.S. energy industry. "A need for cleaner fuel is generally good for refiners," says Alan Gelder, who runs refining and marketing research for Wood Mackenzie.

U.S. refineries are especially well-positioned. They are, on average, the most sophisticated, or "complex," in the world, able to extract a higher proportion of lighter, low-sulfur fuels from each barrel of crude oil. Importantly, more-sophisticated refineries can do this even using heavier, higher-sulfur, or "sour," crude oil. So while more basic refineries will bid up the price of lighter, sweeter barrels to meet the demand generated by the rule change, their more advanced competitors can tap the cheaper, sourer stuff.

At a company level, U.S. integrated majors and refiners tend to sit toward the top of the scale:

Complexity scores don't tell the whole story. European refiners, especially Total SA of France and Spain's Repsol SA, already produce a disproportionately high yield of distillate from each barrel of crude, meaning they should also benefit.

While U.S. refiners don't score highly on this ranking, that's only because they are geared toward producing more gasoline for the local market. It's worth bearing in mind that their yield of fuel oil — effectively in the IMO's cross-hairs — is typically less than 5 percent of the barrel, while the integrated majors tend to yield more like 5-10 percent.

There will also be relative winners and losers among those further upstream producing crude oil. Those producing heavier, sourer grades could suffer pricing pressure as refiners target lighter, sweeter alternatives.

Canadian producers that don't upgrade their oil-sands output or lack adequate refining capacity of their own, such as Pengrowth Energy Corp., have the highest potential exposure as price-takers, while more integrated firms such as Suncor Energy Corp. look more resilient. Russian majors also look exposed, as my colleagues in Bloomberg News reported Monday.

In general, a sweeter slate of crude should provide more opportunities to capitalize on shifts in demand. The chart below (courtesy of data provided by Rystad Energy, a consultancy and research firm) shows projections for estimated sweet crude-oil output in 2020 for a selection of large, listed companies in North America and Europe, both as a share of operated production and in absolute terms.

Even as potential winners and losers from the IMO rules emerge, however, there's a broader impact to consider, extending far beyond just refiners and producers of oil.

Sudden shifts in demand for oil, even a relatively marginal amount like a couple of million barrels a day, can move the entire market. If there is a scramble for low-sulfur fuel by shipowners, and supply is tight, then prices could spike. That's great for refiners able to capitalize on it. But it isn't for the ships and trucks that run on it.

And a scramble by refiners for sweeter crude-oil grades could drag those prices up too. Even if margins on other refined products such as fuel oil and gasoline drop, the net effect could be a hefty increase in the price of fuels across the board. Phil Verleger, an energy economist, warned of this prior to the spike in 2008, identifying tightening regulations on diesel emissions as contributing to the squeeze in the oil market. He warns of similar risks today.

Higher prices will ultimately spur necessary shifts in the refining and shipping industries. In the short term, however, adjusting to sudden oil-price increases usually involves the blunter response of using less of it. Global trade, already suffering the effects of Sino-U.S. rivalry, may soon have an oil problem, too.

New Report Details Cabotage Laws from Around the World

September 25, 2018 by Mike Schuler

Approximately 80% coastal member states of the United Nations have some form of cabotage laws governing foreign maritime activity in their domestic coastal trades, according to an independent analysis conducted by the Seafarers' Rights International (SRI), a leading international research center on maritime and seafarers' law.

The key finding was part of a new report published Tuesday by SRI that explores the nature and extent of cabotage laws around the world. The study, which was commissioned by the International Transport Workers' Federation (ITF), provides the first independent analysis of maritime cabotage laws since 1992.

The report published today, titled *Cabotage Laws of the World*, has identified for the first time ninety-one member states of the United Nations that have cabotage laws restricting foreign activity in their domestic coastal trades. It also describes the history of maritime cabotage and traces a number of early rudimentary legal principles, as well as sets out examples of the many different definitions of cabotage that exist today at the national, regional and international levels. The report also highlights examples of the restrictions of foreign activity and waivers in domestic coastal trades.

"For many people maritime cabotage, or coasting, coastwise or coastal trade as it is sometimes referred to, is understood, if at all, only vaguely," said Deirdre Fitzpatrick, Executive Director of SRI. "This is not surprising since so little is published on the subject. This was a complex project, given language and cultural barriers and difficulties in statutory interpretations. But the subject is important. It affects a very wide range of trades, services and activities around the world, and with significant social and economic consequences. Policy makers especially need to know more about the subject."

The ITF and its affiliates have been campaigning globally to underline the importance of national cabotage laws and the value of having domestic jobs in national waters, as well as domestic employment conditions for foreign seafarers in cases where national seafarers are not available. The workers union group welcomed the publishing of the report, calling it a ground-breaking analysis of maritime cabotage laws around the world.

"The lack of accurate facts on cabotage laws around the world has been an impediment for policymakers considering implementing cabotage laws. This report represents a circuit breaker, providing policymakers with the relevant facts for proper decision-making," commented ITF Seafarers' Section Chair, David Heindel.

“The SRI report debunks the myth that cabotage is an exception, not the rule. Laws governing maritime activity are widespread, currently existing in 91 countries covering 80% of the world’s coastlines of UN Maritime States,” Heindel added.

According to the report, cabotage laws are commonplace and geared towards protecting local shipping industries, ensuring the retention of skilled maritime workers and preservation of maritime knowledge and technology, promoting safety and bolstering national security.

The key findings from the report include:

- Cabotage is “widespread” – 91 member states and eighty percent of the world’s coastlines of UN maritime states have cabotage laws
- Cabotage policy objectives are diverse and designed to: maintain national security, promote fair competition, develop human capacity, create jobs, promote ship ownership, increase safety and security of ships in port, enhance marine environmental protection and preserve maritime knowledge and technology
- Cabotage exists in every region of the world, and in a diversity of political, economical and legal systems
- Cabotage laws have endured in some countries for centuries

James Given, Chair of the ITF Cabotage Task Force commented: “The benefits of cabotage laws are self-evident. For countries that depend on the sea for their trade, cabotage safeguards their own strategic interests as maritime nations, bringing added economic value whilst also protecting national security and the environment.

“Cabotage provides jobs for a country’s seafarers and also safeguards foreign seafarers against exploitation posed by the liberalisation in the global shipping industry, preventing a race to the bottom.

“Without strong cabotage rules, local workers often have to compete with cheap, exploited foreign labour on Flag of Convenience vessels, the owners of which usually pay sub-standard wages and flout safety laws,” Given said.

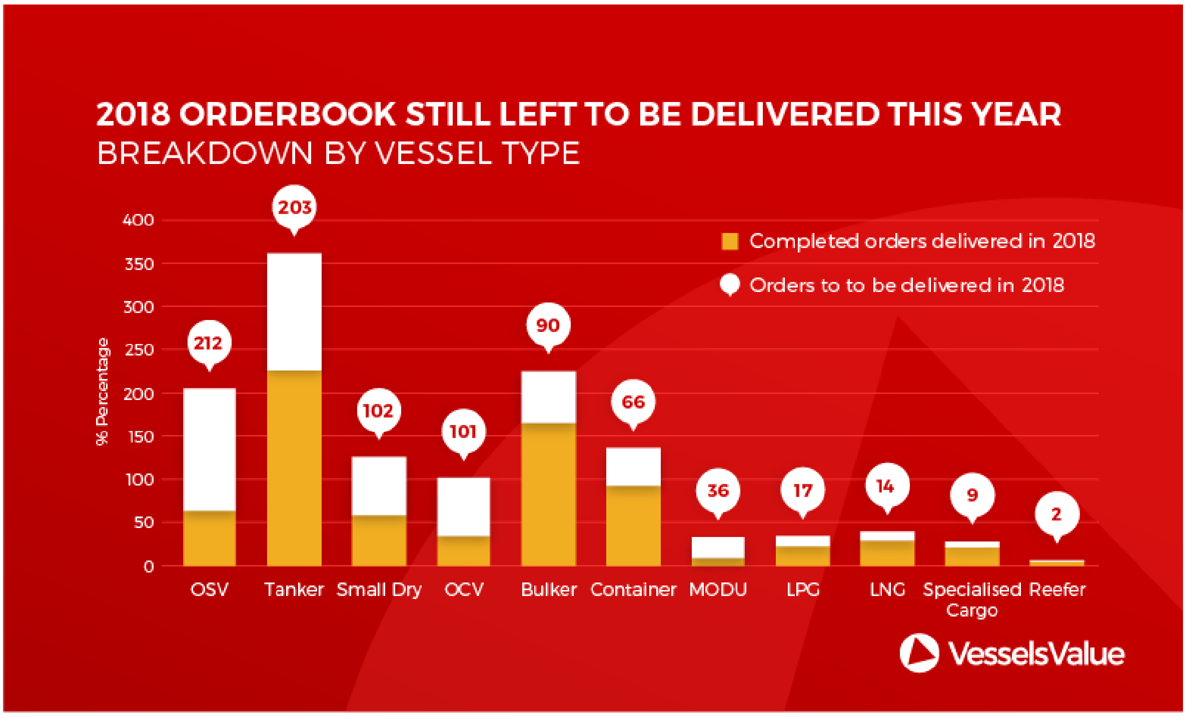
In the United States, cabotage laws that govern the transportation of goods and people between domestic ports are commonly referred to as the “Jones Act,” an essential maritime law that requires movements of goods and people be on vessels that are U.S.-flagged, U.S.-crewed, U.S.-built and U.S.-owned. This comprehensive study of UN members’ maritime policies and cabotage requirements can further inform policymaking in a fact-based manner.

“The United States is, and always has been, a maritime nation. From the very founding of our country, the American maritime industry has served a critical role in maintaining our national, homeland and economic security,” said Matt Woodruff, Chairman of the American Maritime Partnership. “For policymakers that work to promote a strong and vibrant economy and national security leaders charged with protecting the U.S. security posture, this comprehensive study reinforces the importance of cabotage laws – like the Jones Act – and the historical legislative actions taken to support maritime industries across the globe, including in nations like Russia, China and South Korea.”

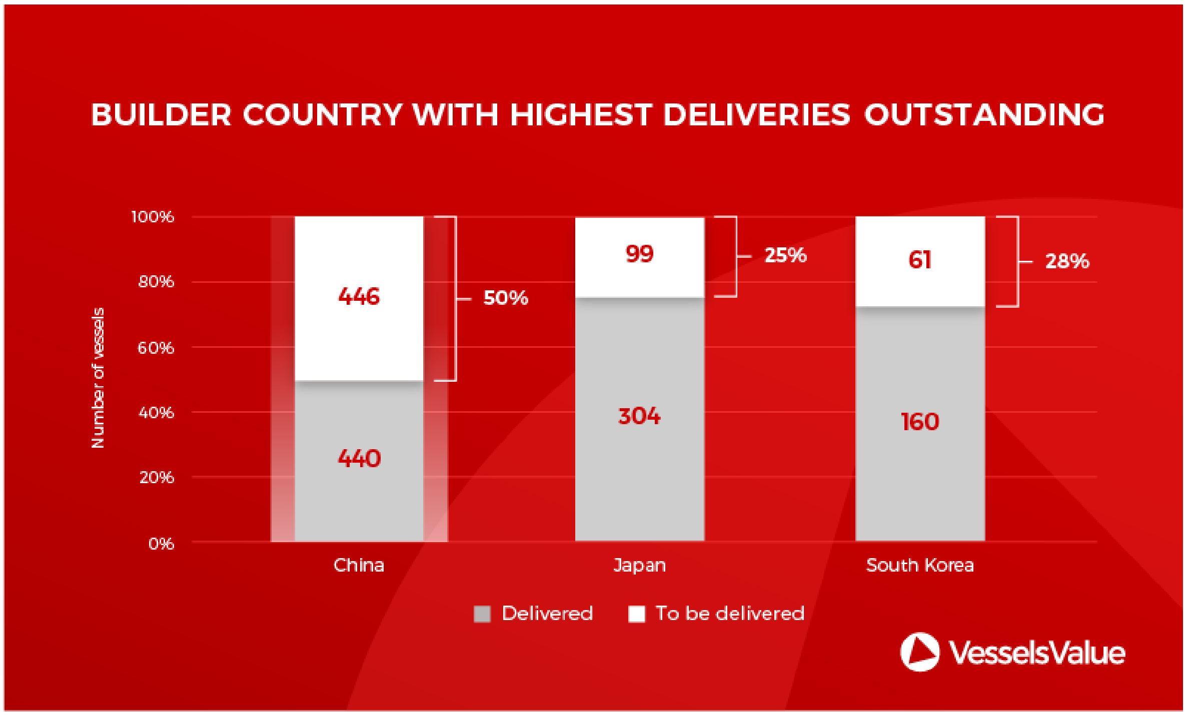
44% de los barcos que se entregarían en 2018 aún están en astilleros

1 noviembre, 2018 Por Redacción PortalPortuario

La consultora VesselsValue dio a conocer que el 44% de los barcos que serían entregados durante 2018 todavía están en astilleros. En su último reporte, facilitado a PortalPortuario.cl, para este año se había programado la entrega de 1.966 naves, pero solo 1.100 han tocado el agua.



Según VesselsValue al cierre del año hay una tendencia a disminuir la entrega, ya que si los armadores esperan un par de semanas para recibir sus buques el año entrante, la nave se considerará "un año más joven" o más nueva.



De los tres principales países de construcción naval, China aún tiene el 50% de los pedidos del año para entregar en los últimos dos meses de 2018, mientras que Japón y Corea del Sur aún mantienen sin botar el 25% y el 28%

de sus libros de pedidos pendientes. De esta manera, se proyecta que los astilleros chinos podrían pasar la entrega para 2019 de 446 embarcaciones.

Los tipos de buques con mayor número de entregas pendientes son los tipo Modu con 75%, los OSV con 69%, los OCV con 67 y los Small Dry con 54%, detalló VesselsValue.

Bunge, Cargill, ADM and Louis Dreyfus join forces to digitise agrishipping

OCTOBER 26TH, 2018 SAM CHAMBERS

Four of the largest grain traders in the world are partnering to seek ways to digitise shipping transactions.

Archer Daniels Midland (ADM), Bunge, Cargill and Louis Dreyfus said in a release they are investigating ways to standardise and digitise global agricultural shipping transactions for the benefit of the entire industry, citing the benfits of blockchain and artificial intelligence.

Initially, the four companies will focus on technologies to automate grain and oilseed post-trade execution processes.

Longer term, the companies said they want to drive greater reliability, efficiency and transparency by replacing other manual, paper-based processes tied to contracts, invoices and payments, with a more modern, digitally based approach.

“By working together to design and implement a digital transformation, we will bring hundreds of years of collective knowledge and experience to simplify processes and reduce errors for the benefit of the entire industry,” said Juan Luciano, ADM’s chairman and CEO.

Soren Schroder, Bunge’s CEO, said, “We expect an industry-wide initiative of this nature to be able to accelerate improvements in data management and business processes, and bring much-needed automation to the industry. Promising technologies will not only provide synergies and efficiencies for ourselves, we believe they will prove vitally important to serving customers better by laying the foundation to enable greater transparency.”

David MacLennan, Cargill’s chairman and CEO, said, “Agriculture has always been a technology industry.

Farmers and our customers expect us to deliver innovations that make them more efficient, effective and profitable. We embrace this as an opportunity to better serve the industry and ignite innovation through new products, processes and partnerships.”

Ian McIntosh, Louis Dreyfus’s CEO, said, “In January this year, LDC completed the first agricultural commodity transaction through blockchain, which showed the technology’s capacity to generate efficiencies and reduce the time usually spent on manual document and data processing. By working with the industry to adopt standardised data and processes, we can truly harness the full potential of emerging technologies to improve global trade.”