

第 24 回 JECKU 造船首脳会議 報告

平成 27 年 11 月 19 日

日 程： 2015 年 11 月 4 日(水)～6 日(金)
場 所： ヒルトン中山ダウンタウン (中国・中山市)
出 席 者： (日本) 村山日本造船工業会会長ほか.....25 名
(欧州) Mr. Corrado Antonini / ユーロヤーズ会長ほか.....12 名
(中国) Mr. Dacheng Guo / 中国船舶工業行業協会会長ほか.....63 名
(韓国) Mr. Dae-Young Park / 韓国造船海洋協会会長ほか.....21 名
(米国) General Dynamics NASSCO (米国の造船会社)2 名
合計 123 名

議 題： 各極基調演説、世界経済、各極造船業の概況、新造船需給、船種別市況動向、
CESS 年次総会報告、議長声明、次回会議案内

議長声明： 2 頁以降参照のこと

以上

※本件に関する問い合わせ先：
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第 24 回 JECKU 造船首脳会議
(2015 年 11 月 5 日 中国・中山)

議長声明

1 第 24 回 JECKU 造船首脳会議が 2015 年 11 月 4～6 日に中山で開催された。日本、欧州、中国、韓国、米国の造船 5 極から 123 名の代表者が参加した。

2 会議は世界経済、各極造船業の概況、船種別造船市況、造船需給、造船コストを議題としており、各極の造船業に影響する石油価格、為替、その他の要因も追加的に議論された。

3 世界経済はゆるやかに回復しているが、各地域の経済成長は大きく異なる。具体的には、米国経済の回復は順調で、金利は将来的に上昇するだろう。欧州では、回復へ向けプラスの影響を与える量的緩和政策が継続され、日本ではデフレ脱却と量的緩和政策が維持されるであろう。中国の GDP は下方圧力に直面しているが、中位から上位の速さで増加する見込み。昨年の為替レートは大幅な変動を見せた。強い米ドルが続き、ユーロ、円、ウォンは下落し、中国元は米ドルに対して安定していた。世界貿易の成長は遅く、海運業界は厳しい状況のままである。会議出席者は造船業界の回復には過去の見込みより長い時間を要するとの見解で一致した。

4 各極から最新の造船業の概況が発表された。日本の受注残は継続して増加し、タンカーが新造船契約の大きなシェアを占める。欧州の受注残は微増し、その 60%は客船で構成されている。中国の竣工量は安定しているが、今年の新造船契約は劇的に減少した。韓国の造船所の竣工が減少し、受注した船種が多様化している。LNG 燃料船は、海運業界の発展の将来的なトレンドになりうる。米国の造船所によって建造された世界初の LNG 燃料コンテナ船が 10 月に竣工された。排出規制は新たな船舶設計において重要な役割を果たしていくだろう。米国は、年末までに LNG 輸出を開始し、原油の輸出禁止が解除されるだろう。

5 船種別造船市況に関しても検討がなされた。石油価格の低下によって、原油タンカー市況が活況を呈している。しかし、来年の多大な竣工が、将来の市況に大きな圧力をもたらすであろう。バルクキャリアの市況は、過剰船腹と低運賃によって下落している。10,000TEU を超えるコンテナ船の竣工は、2013 年以降に大きな増加を示しており、コンテナ船の大型化傾向が明らかとなっている。また、過剰船腹によって、2016 年におけるコンテナ船市況の回復が妨げられる懸念が示された。原油価格の低下によりガス価格は下落した。LNG 船の過剰供給は用船料の低下と用船期間の縮小をもたらす。クルーズ船市況の将来は明るい。原油価格の低下が

影響し、オフショア構造物とオフショア支援船の市況は大幅に悪化した。

6 世界的の船腹の供給能力と需給に関する意見交換も行われた。世界貿易の成長は今年の前から減速し、将来の回復に対しては多くの不確実性が存在する。過剰な建造能力と併せて、既存船腹量に対する受注残量の高い割合は、将来の造船需要に負の影響をもたらす。造船所においても稼働率の低下問題が生じている。さらに、オフショア構造物を建造するための幾分か的能力は造船に回帰するだろう。

7 参加者は世界経済の回復がより長い時間を要するとの認識を基本的に共有した。先進国が世界経済成長の原動力としての役割を果たしつつも、新興国や発展途上国、特に中国とインドが世界経済の回復と海上貿易に大きく貢献をしている。世界の造船業は一層の回復を未だ必要とし、課題への様々な打開策に取り組むために、すべての当事者がより多くの情報を共有し、更なる建設的な意見交換を行うことに合意した。

8 第25回 JECKU 造船首脳会議は2016年秋に韓国・慶州で開催されることが合意された。

**24th JECKU Top Executive Meeting
5th November 2015, Zhongshan China**

Chairman's Note

1 The 24th JECKU Top Executive Meeting was held on 4th-6th November, 2015 in Zhongshan. 123 delegates participated from five shipbuilding regions including Japan, Europe, China, Korea and US.

2 The meeting covered the world economy, regional shipbuilding situations, shipbuilding markets by ship type, shipbuilding supply and demand, and shipbuilding costs. Additionally, the impacts of oil price, the exchange rate and some other factors on the shipbuilding industry of each region were discussed.

3 Regarding the global economy, it is recovering slowly, while the growth of each of economic entities is quite different. Specifically, the recovery of the US economy is stable and interest rates may rise in future. For Europe, the euro zone will continue to apply the QE policy which is likely to have a positive impact on its recovery. Japan will emerge from deflation and will maintain QE policy. The GDP of China is likely to keep increasing in a medium or high speed, although facing the downward pressure. In the past year, the exchange rates fluctuated significantly. The US dollars kept strong, Euro, YEN and WON devalued, and CNY was steady against the US dollar. The global trade growth was slow and the global shipping industry is still in a tough situation. The participants shared the view that recovery period for the shipbuilding industry will be longer than estimated in the past.

4 The latest shipbuilding situations were presented respectively by regions. The orderbook of Japanese shipyards has been increasing continuously, and tankers have taken a greater shares of the newbuilding contracts. The value of the European orderbook has increased slightly, 60% of which was made up of passenger ships. The completion of Chinese shipyards is still steady, although the newbuilding contracts declined dramatically this year. The delivery of Korean shipyards decreased and new order by ship type have changed with diversification. LNG powered ship may be a future trend of the global shipping development. The world's first LNG powered containership built by a US shipyard was delivered in October. The emission regulations will continue

to play a key role in new vessel designs. The US is scheduled to begin exporting LNG by end of the year and the crude oil export ban may be lifted.

5 The shipbuilding market for different ship types has also been reviewed. Due to the drop of oil price, crude tanker market has been kept active. However, the heavier delivery next year will bring great pressure to the future market. The bulk carrier market was depressed due to fleet overcapacity and low freight rates. Containership newbuilding delivery above 10,000 TEU has shown considerable growth since 2013 and the maximization trend of the container ship has been obvious. The concerns have also been expressed that overcapacity may hinder the recovery of the boxship market in 2016. Gas price fell due to plunging oil price and LNGC oversupply has led to charter rate falling and shorter charter periods. The future of the cruise market seems to be optimistic. Also affected by the fall of oil prices, offshore structure and offshore support vessel markets significantly declined.

6 The delegates have also exchanged views about the global fleet supply, demand and capacity. The global trade growth has been declining since the beginning of this year, leaving more uncertainties for future recovery. The high rate of orderbook to existing fleet combined with fleet overcapacity will have negative impacts on future shipbuilding demand. The active yards also have the issue of idle building capacity. Additionally, some capacity for the construction of offshore structures will come back to haunt shipbuilding.

7 The delegates generally shared the view that the world economy will need a longer time to recover. Although the developed countries are acting as the dynamic for the global economic growth, the emerging and developing economies, especially China and India, are making great contributions to the global economic recovery and seaborne trade. Global shipbuilding industry still needs to further recover. It has been agreed that all parties should share more information and exchange further constructive opinions in order to address different formulas to better cope with the challenges.

8 The delegates have agreed that the 25th JECKU Top Executive Meeting will be held in Gyeongju in Autumn 2016.

第 24 回 JECKU 造船首脳会議 出席者リスト(1)

日本

	Full Name	Company Name	Position
1	Mr Noriyuki TAKAHASHI	IHI Corporation	Assistant to President, Sales Headquarters
2	Mr Yukito HIGAKI	Imabari Shipbuilding	President
3	Mr Kazuyuki HIGAKI	Imabari Shipbuilding	Executive Senior Managing Director
4	Mr Kenji WATANABE	Imabari Shipbuilding	Director, Manager of Tokyo Branch
5	Mr Shinjiro MISHIMA	Japan Marine United Corporation	President and CEO
6	Mr Hiroshi IWAMOTO	Japan Marine United Corporation	Counselling Staff, Corporate Planning
7	Mr Shigeru MURAYAMA	Kawasaki Heavy Industries	President
8	Mr Akio MURAKAMI	Kawasaki Heavy Industries	Senior Vice President
9	Mr Yasushi NAGATA	Kawasaki Heavy Industries	Deputy Sr Mgr,
10	Mr Hitoshi ONO	Kawasaki Heavy Industries	Assistant to General Manager, Ship Sales Division
11	Mr Hideaki OMIYA	Mitsubishi Heavy Industries	Chairman of the Board
12	Mr Takashi TSUCHIYA	Mitsubishi Heavy Industries	General Manager
13	Mr Yasuhiko KATOH	Mitsui Engineering & Shipbuilding	Chairman, Representative Director
14	Mr Zhigang ZHANG	MTSUIZOSSEN (SHANGHAI)	President
15	Mr Mitsuaki OKADA	Mitsui Engineering & Shipbuilding	Manager, Ship & Ocean Project Sales Dept.
16	Mr Sho MINAMI	Oshima Shipbuilding	Company CEO
17	Mr Yoshinori KAMICHIKA	Oshima Shipbuilding	Managing Director
18	Mr Hisashi KADOTA	Shin Kurushima Dockyard	President
19	Mr Takanobu MURAKAMI	Shin Kurushima Dockyard	Managing Officer
20	Mr Yoshio HINOH	Sumitomo Heavy Industries	Senior Corporate Adviser
21	Mr Koichi MIYAJIMA	Sumitomo Heavy Industries Marine & Engineering	General Manager
22	Mr Daisuke KIUCHI	The Shipbuilders' Association of Japan	Executive Managing Director
23	Mr Masashi TERAKADO	The Shipbuilders' Association of Japan	General Manager
24	Mr Toshifumi TSUCHIYA	The Shipbuilders' Association of Japan	Deputy General Manager
25	Mr Takuya MINATO	The Shipbuilders' Association of Japan	Assistant Manager

欧州

	Full Name	Company Name	Position
1	Mr Corrado ANTONINI	Euroyards	Chairman
2	Mr Luigi MATARAZZO	FINCANTIERI	Deputy Chief Operation Officer
3	Mr Fabrizio FERRI	FINCANTIERI (Shanghai) Trading	CEO
4	Mr Paolo LOTTI	FINCANTIERI	Managing Director
5	Mr Arnaud LE JONCOUR	STX FRANCE	Senior Vice President
6	Mr Bernard MEYER	MEYER WERFT	Managing Partner
7	Mr Kommer DAMEN	Damen Shipyards Group	Chairman
8	Mr Hans VOORNEVELD	Damen Shipyards Group	Division Director
9	Mr Ralph DAZERT	Netherlands Maritime Technology	Market Analyst
10	Mr Manuel Angel RECAMAN RIVAS	Navantia	VP Engineering & Innovation
11	Mr Harald FASSMER	Fr. Fassmer	Managing Director
12	Mr Reinhard LUKEN	Verband für Schiffbau und Meerestechnik	General Managing Director

韓国

	Full Name	Company Name	Position
1	Mr Sam H. KA	Hyundai Heavy Industries	Senior Executive Vice President & COO
2	Mr Kisun CHUNG	Hyundai Heavy Industries	Senior Vice President
3	Mr Moo Sung PARK	Hyundai Heavy Industries	Vice President
4	Mr Young Cheol YANG	Hyundai Heavy Industries	Senior Sales Officer
5	Mr Sung Geun LEE	Daewoo Shipbuilding & Marine Engineering	Executive Vice President
6	Mr Hyung Gun PARK	Daewoo Shipbuilding & Marine Engineering	Vice President
7	Mr Yoonsik JANG	Daewoo Shipbuilding & Marine Engineering	Manager
8	Mr Dong Ming SHEN	Daewoo Shipbuilding & Marine Engineering (Shandong)	Assistant Manager
9	Mr Dae Young PARK	Samsung Heavy Industries	President & CEO
10	Mr Hyung Do KIM	Samsung Heavy Industries	Executive Vice President
11	Mr Young Keun CHOE	Samsung Heavy Industries	Senior Manager
12	Ms Dong Im KWAK	Samsung Heavy Industries	Assistant Manager
13	Mr Hee Suck EUN	Hyundai Samho Heavy Industries	Senior Vice President
14	Mr Hwan Goo KANG	Hyundai Mipo Dockyard	President & CEO
15	Mr Jin Kyu YOON	Hyundai Mipo Dockyard	Senior Vice President
16	Mr Byung Mo LEE	STX Offshore & Shipbuilding	President / CEO
17	Mr Yoon Keun JANG	STX Offshore & Shipbuilding	Executive Vice President
18	Mr Kyung Min LEE	STX Offshore & Shipbuilding	Assistant Manager
19	Mr Young Ju SUH	Korea Offshore & Shipbuilding Association	Vice Chairman
20	Mr Seok Joo CHUNG	Korea Offshore & Shipbuilding Association	General Manager
21	Mr Bong Ki KWON	Korea Offshore & Shipbuilding Association	Senior Manager

第 24 回 JECKU 造船首脳会議 出席者リスト(2)

中国

	Full Name	Company Name	Position
1	Mr Dacheng GUO	China Association of the National Shipbuilding Industry	Chairman
2	Mr Qiang WU	China Association of the National Shipbuilding Industry	Executive Vice Chairman
3	Mr Minjun CHEN	China Association of the National Shipbuilding Industry	Executive Vice Chairman
4	Mr Peng JIN	China Association of the National Shipbuilding Industry	Secretary General
5	Ms Miao XU	China State Shipbuilding Corporation	Assistant President
6	Mr Jigang SHENG	China State Shipbuilding Corporation	Director
7	Mr Yousheng CAO	China State Shipbuilding Corporation	Vice Director
8	Mr Liwei GUO	China State Shipbuilding Corporation	Deputy Division Chief
9	Mr Pengcheng GU	China State Shipbuilding Corporation	Manager
10	Ms Feifei CHEN	China State Shipbuilding Corporation	Researcher
11	Mr Liang WANG	China Shipbuilding Industry Corporation	Director
12	Mr Xinqi WANG	China Shipbuilding Industry Corporation	Chief of Section
13	Mr Yanwei DING	China Shipbuilding Industry Corporation	Secretary
14	Mr Dusheng ZHOU	Guangzhou Shipyard International	General Manager
15	Mr Qi WANG	Shanghai Waigaoqiao Shipbuilding	President
16	Mr Jun CHEN	Shanghai Waigaoqiao Shipbuilding	Vice President
17	Mr Gongjie TANG	Wuchang Shipbuilding Industry Group	General Manager
18	Mr Jinjie ZHAO	Fujian Shipbuilding Industry Group	Board Chairman
19	Mr Hong WANG	Penglai Zhongbai Jinglu Ship Industry	Chairman
20	Mr Wenwei SU	China Shipbuilding Industry (Jiangsu)	General Manager
21	Mr Zhongqian CHEN	CSSC Huangpu Wenchong Shipbuilding Company	Chairman of the Board
22	Mr Jianliang CHEN	Hudong-Zhonghua Shipbuilding	Chairman of Board
23	Mr Lianjun JIA	COSCO Shipbuilding Industry Company	Vice General Manager
24	Mr Qinghua JIANG	CSC Shipbuilding Industry Corporation	Deputy General Manager
25	Mr Zhengjian LI	Shiprepair Sub-committee of CANSI	Secretary General
26	Mr Dongming SUN	Bohai Shipbuilding Heavy Industry	Vice President
27	Mr Kechao GU	Qingdao Beihai Shipbuilding Heavy Industry	Vice President
28	Mr Minghua ZHANG	Evergreen Holding Group	Vice President
29	Mr Chengzhong DU	Jiangsu Yangzi Jiang Shipbuilding Group	Vice General Manager
30	Mr Huaqing QIAN	New Century Shipbuilding	Deputy General Manager
31	Mr Genhua GU	Yangfan Group	Executive Vice President
32	Mr Tongli JIANG	Yangfan Group	Assistant President
33	Mr Shuming ZHAN	COSCO Shipyard Group	Chief Engineer
34	Mr Weizan YANG	Dalian Shipbuilding Industry	Deputy Technical Director
35	Mr Jianxin GAO	Dalian Shipbuilding Industry	Deputy Minister of Marketing
36	Mr Hao JIANG	Jinhai Heavy Industry	CFO
37	Mr Wenjing LIU	Jinhai Heavy Industry	GM of Strategy & Investment Department
38	Mr Shang GAO	China International Marine Containers (Group)	Director Offshore Division
39	Mr Binfeng AN	China Shipbuilding Information Center	Vice President
40	Mr Guang HAN	China Shipbuilding Information Center	Deputy General Engineer
41	Mr Song TAN	China Shipbuilding Information Center	Senior Market Analyst
42	Mr Wei FAN	China Shipbuilding Information Center	Engineer
43	Ms Hong YUE	China Shipbuilding Information Center	Engineer
44	Mr Zhangjing BAO	China Shipbuilding Industry Research Center	Director
45	Mr Qi ZHANG	China Shipbuilding Industry Research Center	Engineer
46	Mr Yu XIE	China Shipbuilding Industry Research Center	Senior Engineer
47	Mr Xinnan QIAN	China Association of the National Shipbuilding Industry	Deputy Secretary General
48	Ms Naifen TAN	China Association of the National Shipbuilding Industry	Division Director
49	Mr Langsheng ZHANG	Zhongshan Torch Group	General Manager
50	Ms Yingji ZHAO	Zhongshan Torch Group	Deputy Manager
51	Mr Junfa CHEN	Guangxin Shipbuilding & Heavy Industry	General Manager
52	Mr Xuezhong WANG	Guangxin Shipbuilding & Heavy Industry	General Manager Assistant
53	Mr Hanhui LIN	Zhongshan Marinotec Development	Chairman
54	Mr Suihong LIN	Zhongshan Marinotec Development	General Manager
55	Mr Yongjie ZHONG	Guangdong K-LINK Shipping	General Manager
56	Mr Xuehua GONG	Zhongshan JIANGLONG Shipbuilding	Deputy General Manager
57	Mr Youqiang SHEN	Zhongshan KingShip&Boats	Deputy General Manager
58	Mr Liwen ZHANG	China Association of the National Shipbuilding Industry	Deputy Section Director
59	Mr Bolian LIU	China Association of the National Shipbuilding Industry	Deputy Section Director
60	Mr Guanjun LIANG	China Association of the National Shipbuilding Industry	Engineer
61	Mr Yiming ZHENG	China Association of the National Shipbuilding Industry	Engineer
62	Ms Qi ZHAO	China Association of the National Shipbuilding Industry	Engineer
63	Ms Lin JIANG	China Association of the National Shipbuilding Industry	Engineer

美国

	Full Name	Company Name	Position
1	Mr Thomas WETHERALD	General Dynamics NASSCO	Director
2	Mr Peter BROWN	General Dynamics NASSCO	Manager