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Scrubbers are tried, tested and still getting better

ONLY A SMALL minority of the operators who must comply with the International Maritime Organization's sulphur cap have opted to use scrubbers.

It is still a difficult call to make, at least until the price of low-sulphur fuel oil settles down into established parameters.

But what we do know is that exhaust scrubbing technology is tried and tested, has been around for more than 60 years and successfully used on ships for over a decade.

If there are still technical quibbles, enthusiasts maintain that scrubbers will continue to evolve as the industry moves towards ever-tougher environmental goals in the longer term.

The idea of using water droplets to scrub exhaust gases clean was first explored in the 1950s, and rapidly became an approved and accepted technology in many shore-based industries, most notably electricity generation.

Not only did these systems often use seawater as the wash water, but this was even seen as advantageous, because its salinity negated the need to add further chemicals.

After wet scrubbers proved their worth by their contribution to environmental mitigation on land, engineers naturally began to think about they could be applied to marine use.

By the time Sulphur Emission Control Areas arrived in May 2005, under Marpol Annex VI, the regulatory imperative began to concentrate minds.

Vessel operators realised that the use of scrubbers could allow them to continue using existing fuel oils rather than to switch to more expensive ultra-low sulphur fuels, namely refined distillate products with a sulphur content of less than 0.1%.

Ferry sector

The ferry sector seems to have led the way, with the Clean Shipping Alliance 2020 — an industry grouping of commercial and passenger shipping companies — highlighting the installation of an exhaust gas cleaning system on board DFDS's Ficaria Seaways, which has achieved more than 50,000 running hours since 2009.

As the 37,939gt ro-ro operates inside the stringent European Seca on the Gothenburg-Immingham route, it was decided to fit an Alfa Laval PureSOx system.

"The installation has prevented a substantial amount of sulphur emissions from entering the atmosphere," says DFDS's director for environment and sustainability Poul Woodall.

Data from the high-sulphur heavy fuel oil-burning Ficaria Seaways shows that during the 10-year period, SOx emissions have been kept at only 0.05%.

"Had the vessel been trading on compliant fuel during these 10 years, then SOx emissions would have been almost 60 times higher," he adds.

This has been verified in tests carried out in 2012 by the Danish Environmental Protection Agency, which concluded that on average only half the SOx permitted in the Seca was emitted through the scrubber system. Emissions equalled a sulphur content in fuel of 0.05% for the vessel.

Essentially, the vessel emitted 150 tonnes less of SOx than if it had been operating on compliant 0.1% marine gasoil.

The tests also found reported particulate matter numbers were in the 31%-53% range, while mass was reduced by up to 55%.

"All in all, some very good statistics for those of us who are concerned about air quality and system performance," says Mr Woodall.

The operational performance of the scrubber was verified from internal measurements carried out by DFDS, which indicated scrubber downtime of less than 0.002% during the 12-month period to July 1, 2019. DFDS now has scrubber technology on board 28 vessels with 10 more on order.

Fossil fuels

However, Mr Woodall believes that current scrubber technology is not enough, especially if the IMO's target of 50% reduced greenhouse gas emissions by 2050 (compared with the base year of 2008) is to be met. Ultimately there will have to be an alternative to fossil fuels.

"However, until such alternatives are identified and developed for practical use, the current exhaust gas cleaning systems have proven themselves to be reliable, effective means of dramatically improving air emissions without impacting the marine environment and will continue to exceed the international air quality requirements in thousands of ships worldwide," says Mr Woodall.

Meanwhile, scrubber manufacturer Yara Marine believes that scrubbers have further to go. At the very least, research work into the total benefits of exhaust cleaning systems needs to continue.

"Shipping, and any other industry that uses environmentally sound technologies that are focused on long-term sustainability, need to be allowed to continue their research and growth, especially when such solutions make environmental and economic sense," Yara says.

Shipping remains complicated, and it would be wrong to back one environmental technology in favour of another, which could reinforce the idea that shipping does not want to do the right thing.

"As an industry we are in a significant period of transformation and we need to be unreservedly optimistic about our goals and efforts.

"There is no denying that owners need the solutions which technology companies invest heavily in finding and developing on their behalf. Therefore, we need to work together."

WHAT TO WATCH

BW Group reverses position on Hafnia

MAJOR product tanker owner Hafnia has cut a planned $345m private placement by up to 33.3% with parent BW Group scrapping plans to sell its shares in the company.

Hafnia, which trades in the Norwegian over-the-counter market, said it was targeting a private placement based on new equity issuance, sale of existing shares and an over-allotment offering, ahead of its full listing on the Oslo Stock Exchange, which is expected to start this Friday.

The application period for the placement was meant to close last week and Hafnia said it received significant interest within the indicative prices.

"However, the bookbuilding period coincided with volatility in tanker stocks, and consequently, the company was not in a position to allocate a book at full transaction size at the original expiry of the bookbuilding period in the pre-listing private placement," the company said on Monday

The Mikael Skov-led company will now target a new private placement offering ranging between $230m and $287.5m, with the new application process closing tonight at 2200 hrs Central European Time.

It has decided to drop the price of its share offering to a fixed NKr25.45 ($2.80) per share, putting the company's pre-money equity worth at $950m.

Last week, it was offering shares at between NKr26.20 and NKr30.90, which elevated the company's pre-money equity value to between $975m and $1.15bn.

Hafnia still intends to use the proceeds of the offering for the same purposes. It wants to use $35m for the equity portion of the acquisition of two 2015-built medium range product tankers, StenaWeco Andrea Corrado and StenaWeco Caterina Corrado, and $30m for an unsecured loan.

Another $35m will go toward the repayment of an existing unsecured RCF facility provided by BW Maritime.

Under the revised private placement, instead of issuing $125m worth of new shares Hafnia will issue $75m in the primary offering.

Meanwhile, in the secondary offering, a consortium of existing shareholders, including PAG, Davidson Kemper, GNRI, Oak Hill, Blackstone, Tufton and Tennenbaum will sell anywhere between $125m and $175m in company equity, compared with the firm $175m they were planning on offloading last week.

A crucial change in this secondary offering is the complete reversal in the position of parent company BW Group; it was set to sell $25m worth of Hafnia shares. Now it has not only decided to scrap that sale but has already pre-subscribed for $50m more in Hafnia stock under the new private placement.

BW Group has agreed to a 180-day lock-up period that prevents it from selling Hafnia stock.

Hafnia is keeping the over-allotment offering the same rate of 15% of the primary and secondary offerings. This equates to $30m to $37.5m, down from $45m under the original plan.

ANALYSIS

World boxship fleet update: Slowing growth

THE world containership fleet halved its rate of expansion during October, with only 51,000 teu of capacity entering the market during the month, compared with over 100,000 teu in September.

Growth was driven by the continuing delivery of Mediterranean Shipping Co's latest range of 23,000 teu vessels, and a 20,000 teu unit for Evergreen, according to the latest monthly figures from Lloyd's List Intelligence.

The two container lines continue to drive developments in the large ship sector, with both having placed recent orders for further ultra-large tonnage.

Evergreen has 10 23,000 teu newbuildings on the orderbook, and MSC was back at the yards last month with an upgrade to its previous $1.5bn order for 11 ships that it signed in 2017 with Samsung Heavy Industries.

MSC has now taken options on five more ultra-large containerships from South Korea's Daewoo Shipbuilding & Marine Engineering.

In a regulatory filing to the Korea Stock Exchange, the yard said the value of the order was Won903.9bn ($761.9m) and that the ships would be delivered by August 2021.

A spokesman for MSC told Lloyd's List that while the company had no new orders in place, it did have "optional arrangements" with DSME related to previous orders.

He would not confirm the size of the vessels, but brokers contacted by Lloyd's List said the ships would be in the 23,000 teu range and fitted with scrubbers. Figures from Lloyd's List Intelligence indicate that the ships will be 23,656 teu.

These vessels, which are currently being delivered, include the 23,756 teu MSC Gülsün, currently the world's largest containership.

Lloyd's List understands the vessels are fitted with hybrid scrubbers, making them less susceptible to the regulatory challenges facing open-loop scrubbers.

The first ships on the order were financed by Chinese leasing houses CMB Leasing and CCB Leasing.

The price is similar to the figure Evergreen paid for its order, which was said to be underbid, indicating that MSC is using current low yard prices to push forward with its fleet development plans.

Meanwhile, Samsung Heavy Industries also announced last month that it had secured orders for six 23,764 teu ULCs as part of Evergreen's 10-ship programme.

The SHI-built vessels will be owned by Evergreen and Greencompass Marine, an Evergreen affiliate. They will be all delivered by May 2022.

Despite the orders and deliveries, the orderbook stands at a reasonable 12% of the existing fleet, leading to hopes that the equilibrium forming in the containership sector will hold.

Mixed fortunes

However, that equilibrium is not balanced across the whole fleet, according to figures from VesselsValue, which found that larger boxships were far more in demand than smaller ones.

Demand growth in terms of total teu capacity of the large containership fleet being utilised has been strong.

"Over the past three months demand has grown by 2.3% versus a growth in vessel supply by total teu capacity of 1.7%," VesselsValue said. "This has certainly been one of the drivers for the significant rise in charter rates over that period."

On an annual basis, supply growth at 4.9% has outpaced demand growth at 3.3% but over a five-year period, demand and supply have been balanced with demand growing at 33.5% and supply at 33.1%.

Further down the size scale, panamax vessels had seen a 2.1% increase in demand over the past quarter at the same time as supply fell by 0.1%.

But this masked a longer-term fall in demand for the former workhorses of the box trades. Over a five-year time scale, demand for panamaxes has fallen by 36.6% while supply of the ships has only decreased by 22.1%.

The worst performance, however, has been in the feeder and handysize classes, where demand has been flat over the past three months despite supply increasing by 3%.

"From a supply-demand perspective this is not great for the smaller sectors," VesselsValue said.

Nevertheless, scrapping remains at historically low levels. Lloyd's List Intelligence reported just two containerships sent for scrap in October, comprising 6,670 teu.

"In the short term, it is possible that sellers observed tumbling scrap steel prices and adopted a wait-and-see approach," said analysts at Maritime Strategies International. "Broadly higher time charter markets will also have helped reduce the incentive to scrap."

One of the demand drivers for larger ships has been the high number of vessels being laid up to have scrubbers installed, taking them out of the market for months at a time.

Idle numbers have shot up over the past month, from 2.4% of the total fleet capacity at the end of September to 3.1% at the end of October, according to Lloyd's List Intelligence.

Of the 705,229 teu unemployed, vessels over 11,000 teu accounted for more than 220,000 teu and it is

likely that the majority of these are having scrubbers fitted.

Alphaliner reckons there are over 80 vessels currently out of service for scrubber retrofits, with another 14 waiting for yard space to become available.

"Vessel congestion at various yards has worsened as scrubber retrofit works have taken longer than anticipated," Alphaliner said. "Yard stays for the 79 ships that have completed retrofitting works so far this year averaged 62 days, compared to initial expectations of 40 to 50 days."

Those ships that have gone for refits include some famous marques, too, according to Alphaliner.

Seven of the Maersk 18,340 teu Triple-E vessels have been fitted with scrubbers since July this year, with all 20 ships in the series expected to be scrubber fitted by the middle of 2020.

Maersk will also be installing scrubbers on its fleet of 11 second-generation 20,568 teu Triple-E units, with the first unit expected at the repair yard on November 3, Alphaliner said.

MARKETS

Carriers hope for trade war truce before next round of tariffs

NEWS emerging from China last week that US negotiators had reached a "principled consensus" with their Chinese counterparts will bring some optimism to the container shipping sector.

While not yet confirmed, there are hopes that a partial trade deal, termed "Phase One" by the Trump administration, could be signed soon, bringing a de-escalation of the two countries' trade war, which has been having a damaging effect on transpacific volumes.

"The crucial point from a container shipping perspective will be whether the US will cancel the planned December 15 (List 4b) tariffs and remove some of the current tariffs in line with China's demands," said Sea-Intelligence chief executive Alan Murphy.

"If these issues are not resolved, it is very likely that the Phase One deal will collapse, although current analyst consensus seems to point towards a deal."

Tariff List 4b is critical for container shipping, as the commodity groups covered are highly seasonal goods where China represents 92% of all containerised imports into the US.

"This means that for the List 4b goods, it is not simply a question of scaling up production elsewhere, as these goods are simply not being produced anywhere else at present, so completely new production facilities and sourcing processes would be required," said Mr Murphy.

"If that is not enough of a challenge, the highly seasonal nature of these goods provides additional complications. We will be crossing our fingers for a trade deal, but if one is not reached, the 2020 peak season will require a complete redesign of central supply chains.

"The impact of List 4b may therefore turn out to be very different than for the other tariff implementation rounds, so carriers, freight forwarders and importers should plan accordingly."

Brexit extension relieves pressure on UK logistics sector

THE extension of the Brexit deadline will relieve some of the pressure on the UK logistics sector as the industry enters one of its busiest times of the year, according to the UK Warehousing Association.

The October 31 date set for Britain's departure from the European Union coincided with peak season for many association members, with UK warehouse and distribution facilities operating close to full capacity because of impending retail events such as Black Friday, Cyber Monday and the festive holiday season.

"With Brexit now coming after peak season, the extended deadline should allow our members to deliver Christmas without the added risk and impacts

of a simultaneous ‘day-one, no-deal’ scenario,” said Peter Ward, chief executive of the trade body.

The UK was originally set to leave the EU on March 29, but that was pushed back to October 31 when Prime Minister Theresa May failed to persuade the House of Commons to back her withdrawal agreement. The EU has granted a further extension, to January 2020, after her successor, Boris Johnson, was forced by law to seek the delay.

Mr Ward said he did not see the latest Brexit delay as triggering a renewed drive by shippers to secure more warehouse space.

“Those companies that prepared for Brexit did so in the run-up to the March deadline,” he said. “Data collected by UKWA in September showed little evidence of further stockpiling after April in preparation for October, and we expect little to change in this next period — especially with the threat of a cliff-edge fall-out significantly reduced.”

Mr Ward also highlighted that “good quality, well-located warehousing space remained at a premium within the UK”, but added that Brexit was not the root cause of the problem.

“The warehousing shortage has been driven by several factors, not the least of which is the rapid growth of e-commerce. Additional warehousing is needed, strategically located close to population centres, to meet the online consumers’ expectations of same or next-day delivery, and the necessary infrastructure to support these changes simply is not there at the moment.”

Steve Freeman, managing director of iPort Rail — a rail-connected inland freight terminal linked with associated warehousing facilities in the north of England — said the period from August Bank Holiday to the end of November is typically the busiest period for the logistics and supply chain industry as merchants and retailers across the country move goods in preparation for the Christmas holiday season.

“Postponing the EU leave date means that there will be no extra disruption for the industry at a crucial time of year,” Mr Freeman said. “This should be good news for the retail sector as well as those who depend on it for Black Friday bargains, Christmas shopping and New Year sales.”

Chemical tankers to take a hit from EU ban on palm-based biodiesel

THE European Union’s ban on palm-based biodiesel is expected to have a negative effect on the Asia to Europe palm oil trade as demand will decrease in the long term, according to shipping consultant Drewry.

In a report, Drewry says it expects that the volume of palm oil into Europe from Southeast Asia will drop, having “a detrimental impact” on chemical tanker demand because of the long-haul trades involved.

In 2018, Indonesia supplied 25% and Malaysia 28% of total palm oil imports into the EU, said lead analyst at Drewry’s research unit Hu Qing.

The overall volume of biodiesel carried by chemical tankers grew at a compound annual growth rate of 7.9% during 2013 to 2018, with a further expansion of 1.8% this year, the analyst said, while the tonne-mile demand surged by 38% last year, due to strong growth in long-haul trades. The EU was the biggest market.

However, the EU in January 2018 had voted to ban the use of palm-based biofuels by 2020 on concern that cultivation of palm oil leads to excessive deforestation. Following outcries by leading producers Indonesia and Malaysia, the EU decided to phase out support gradually to 2030.

Under the revised plan, palm oil would remain in use at the 2019 level until 2023, after which it will be phased out by 2030, according to Drewry. All imports are required to have a sustainability certificate.

“With the palm oil phase-out, Europe will see both a change in the source of biodiesel imports and the feedstock used to produce biodiesel,” said Ms Qing.

The EU is increasingly turning to imports from China, where unused cooking oil is a key feedstock, she said, adding that China’s biodiesel exports to the EU rose by more than 70% to 311,000 tonnes during the first eight months of this year.

The EU is also seen importing more unused cooking oil from other countries in Asia such as Japan.

Indonesia nickel ore export ban hits supramax rates

SUPRAMAX rates fell sharply last week as nickel ore cargoes disappeared from the market.

Indonesia's ruling on October 28 to halt nickel ore exports immediately, has completely wiped out several of the country's minor bulk trades, which are of great importance to the segment.

In response, the Baltic Supramax Index fell to its lowest level in more than 10 weeks and stood at 1,045 points on Friday, down 11.4% from a week earlier, with the weighted time charter average dropping to $11,590 per day, down from $13,079 per day on October 28.

Rates on voyages from South China via Indonesia back to South China, or the Baltic Exchange S10_58 route, fell as low as $11,031 per day on Friday, a decline of 14% compared with the levels seen a week ago.

Indonesia announced in August that it would move forward a planned nickel export ban from 2022 to early 2020 to increase domestic processing and reduce the country's reliance on raw material exports.

Since then, according to Indonesian media citing government data, nickel ore exports had quadrupled.

The recent immediate ban follows a probe examining whether exports comprised only unprocessed low-grade mineral, defined as below 1.7% nickel.

Indonesia has banned all exports of higher-grade ore and is only allowing the export of low-grade mineral until the end of 2019, in the major Southeast Asian commodities exporter's attempt to get miners to build nickel smelters and expand local processing capacity.

Meanwhile, Jakarta also imposed the temporary ban because exports exceeded the government's nickel export quota by threefold.

The Indonesian government has given permits — with a certain quota for exports — only to nickel miners who have begun construction of a processing plant to produce various items, such as higher-value stainless steel coil.

Indonesia accounts for 27% of the nickel ore market and China heavily relies on imported nickel ore. The trade is usually carried out in supramax and handysize vessels.

In the first eight months of 2019, Chinese imports of nickel ore increased by 13.4% year on year to 26.2m tonnes, according to customs data, from 23.1m tonnes in the same period last year.

IN OTHER NEWS

Delta Tankers says voyage recorders clear tanker of oil spill

A GREEK tanker company has distanced itself from involvement in an oil spill that has fouled huge swathes of Brazil's coastline after speculation that one of its vessels could be linked to the incident.

Delta Tankers, which runs a mostly Greek-flagged fleet of 30 tankers, said that its vessel, the 2006-built suezmax *Bouboulina*, performed a laden voyage from Venezuela, departing July 19, and sailed directly without any stops to Melaka, Malaysia, where it discharged its entire cargo "without any shortage".
This could be supported with evidence from voyage recording equipment on board the tanker, the company stated.

Yangzijiang wins Navibulgar bulker orders

YANGZIJIANG Shipbuilding has won more orders in the absence of its chairman Ren Yuanlin.

The contract revealed this time, consisting of four 31,800 dwt Great Lake bulker newbuildings plus two optional vessels, were placed by Bulgarian owner Navigation Maritime Bulgare, also known as Navibulgar, the builder said in an exchange filing. The firm orders are scheduled for delivery between 2021 and 2022, although the price of the ships was not disclosed.

Capital Product aims for more boxships

CAPITAL Product Partners said expanding its containerships focus "makes sense" and may change its name to reflect the company's recent exit from the tanker market.

Responding to analysts' questions after the release of the US-listed company's third-quarter results, chief executive Jerry Kalogiratos said that Capital Product was "very much cognisant" of market expectations that it would rebuild in scale following the spin-off of

its 25 tankers in a merger with Diamond S Shipping earlier this year.

"We are working on a number of things, and I'm quite positive that we should be able to communicate something to the market before year end," said Mr Kalogiratos.

Pirates seize crew from Norwegian bulker in Gulf of Guinea

NINE crew members were abducted from a Norwegian-flagged bulk carrier off Benin, in yet another reported piracy case in the Gulf of Guinea.

Norwegian owner JJ Ugland announced on Sunday that its 58,105 dwt *Bonita* was boarded by pirates early on Saturday morning when it was anchored off Cotonou, while waiting to berth to discharge gypsum.

The company said the remaining crew notified authorities and the vessel arrived in Cotonou the next day.

Canada's seaports to see 'robust growth'

INFRASTRUCTURE expansion will support robust growth in Canadian ports' throughput during the coming decade, according to the Freight Transport & Shipping Report for the first quarter of 2020 by Fitch Solutions Macro Research.

The company notes that Canada's Atlantic and Pacific coastlines allow the country to meet its import and export needs with the US, while offering access to key trade partners in Europe and Asia.

But it also points out that ports on the St Lawrence Seaway have "limited berthing depths" and are unable to attract large container vessels, limiting their ability to compete with US east coast facilities.

Platts unveils time charter indices for scrubber and non-scrubber bulk carriers

PLATTS has unveiled dual time charter equivalent assessments that allow for daily comparisons of earnings of bulker carriers with and without scrubbers, starting from last Friday, November 1.

The first assessments based on separate 0.5% sulphur marine fuel and individual scrubber premium indexes for capesize, panamax, ultramax and supramax class ships comes two months ahead of International Maritime Organization sulphur regulations.

"The new TCE assessments are calculated using daily marine fuel 0.5% delivered bunker prices published by Platts," the pricing agency said.

Sovcomflot secures lease financing and long charter for Arctic 2 LNG carrier

SOVCOMFLOT has secured a lease financing deal and a charter deal for the first liquefied natural carrier that will service the upcoming Arctic LNG 2 facility in Russia.

The Russian company announced on Monday that major Russian state-controlled financier VEB.RF has agreed to a lease financing deal for the ice-breaking vessel, that is expected to be a first in a series of ships built for the LNG exporting project.

Meanwhile Novatek, the major Russian gas operator that will control 60% of the Arctic LNG 2 facility, will take the vessel on long-term charter. Sovcomflot did not disclose the duration or the terms of the charter.

Pirates abduct four crew members from tanker off Togo

FOUR CREW members have been abducted from a Greece-flagged tanker off Togo. The incident, on Monday, is the second abduction incident in the Gulf of Guinea in as many days.

The Hellenic Coast Guard said the 94,143 dwt product tanker *Elka Aristotle* was targeted off of the Lome Anchorage, resulting in the abduction of four of its 24 crew members.

The four abducted crew include two individuals from the Philippines, one from Greece and one from Georgia.

Three dead after tanker explosion in Russia

THREE people have died after an explosion on a chemical tanker in Russia.

The blast happened on the Russian-flagged, 3,302 dwt *Zaliv Amerika* on November 3, while the vessel was anchored at Nakhodka Bay.

Two crew members died at the scene, while the body of a third was later recovered from the water, according to a report from Lloyd's List Intelligence.

Yilport Holdings chief executive Christian Blauert resigns

YILPORT Holdings chief executive Christian Blauert will step down from the Turkish ports and logistics firm on December 15.

"After being in charge for more than three years and working very closely with chairman Robert Yuksel Yildirim in many projects, I believe in the ongoing success of Yilport as one of the most dynamic and the fastest-growing port management groups in the world," Mr Blauert said in a statement.

He became chief executive in June 2016 after more than a year as Yilport Holdings chief operating officer.

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