



2024年 第1周市场周报

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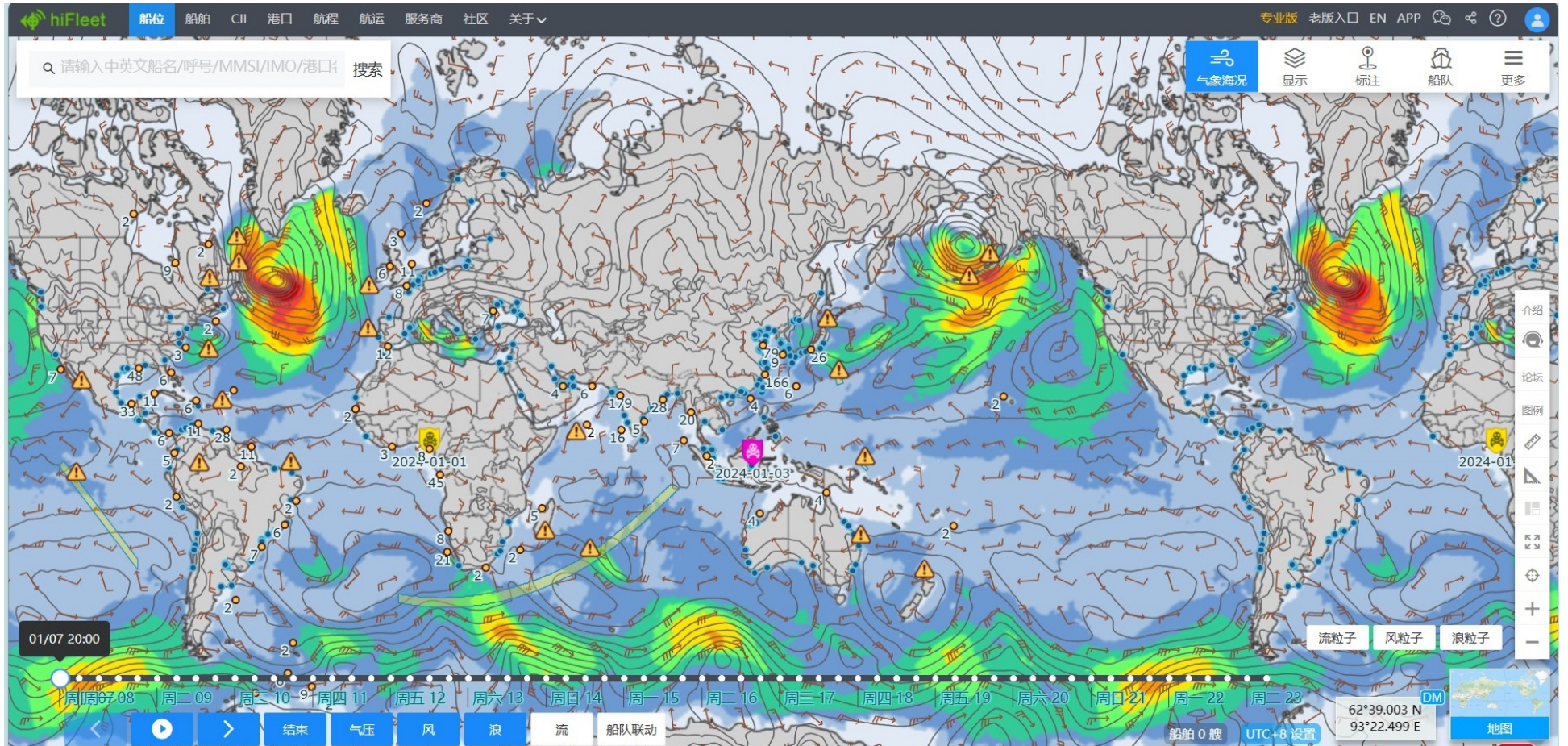
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最新商品价格 LATEST COMMODITIES PRICE

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本周话题 WEEKLY TOPIC

第一部分 航运安全 SHIPPING SAFETY



航行警告 Navigation Warning

HiFleet显示全球目前有效的航行警告有971个，远东和环加勒比海居多，请相关水域船舶注意航行警告内容。There are currently 971 navigational warnings in effect around the ocean on hiFleet with the Far East and around the coastal of Caribbean Sea still being the majority. Please pay attention to the navigational warnings in relevant waters.

海盗事件 Piracy

根据hiFleet数据显示，1月2号一艘新加坡船东的化学品船HANA I在赤道几内亚被海盗所劫持，该船悬挂图瓦卢船旗，13000载重吨，2007年韩国建造，该船目前停靠在喀麦隆西南部港口博纳贝。According to hiFleet data, on January 2, a Singapore owner's chemical tanker HANA I was hijacked by pirates off Equatorial Guinea. The Tuvalu-flagged, 13,000 DWT vessel was built in South Korea in 2007 and is currently docked at the southwestern Cameroonian port of Bonabe.

其它 Others

无 Nil

航海气象 Meteorology

未来一周受冷空气影响，中国渤海、黄海、东海海域风力由4-5级逐步增强到6-7级，相关海域海浪将从2米的中浪到3米大浪；台湾海峡风力由5-6级增强到7-8级，台湾海峡洋面海浪将经历4米巨浪。南海大部海域风力维持在5-6级，海浪有时出现3米大浪。辽东湾最大浮冰范围30-40海里；渤海湾最大浮冰范围5海里左右，莱州湾最大浮冰范围5海里左右；黄海北部最大浮冰范围5-15海里。大西洋和太平洋北部区域低压活动频繁，相关海域海况恶劣。The coming week affected by the cold air the wind in Bohai Sea, Yellow Sea and China East Sea will gradually strengthen from moderate to near gale with the seas from moderate to rough. The wind in the Taiwan Strait will also become strong from breeze to gale. The sea in the Taiwan Strait happens to experience very rough. In most of the South China Sea the wind are still strong breeze and sometimes see rough seas. Low-pressure in the north of North Atlantic Ocean and Pacific is frequent, leading to deteriorating sea conditions.

海上事件 Marine Incidents

路透开罗1月2日电: UKMTO收到船舶报告，在厄立特里亚阿萨布以东33海里的曼德海峡，距离一艘商船1至5海里处发生了3起爆炸。胡塞武装誓言要继续袭击，直到以色列停止在加沙的冲突。Cairo (Reuters) - UKMTO has received reports from a vessel of three explosions between one and five nautical miles from the merchant vessel in the Bab el-Mandab Strait, 33 nautical miles east of Assab, Eritrea. The Houthis have vowed to continue their attacks until Israel stops its conflict in Gaza.

备注 Remark

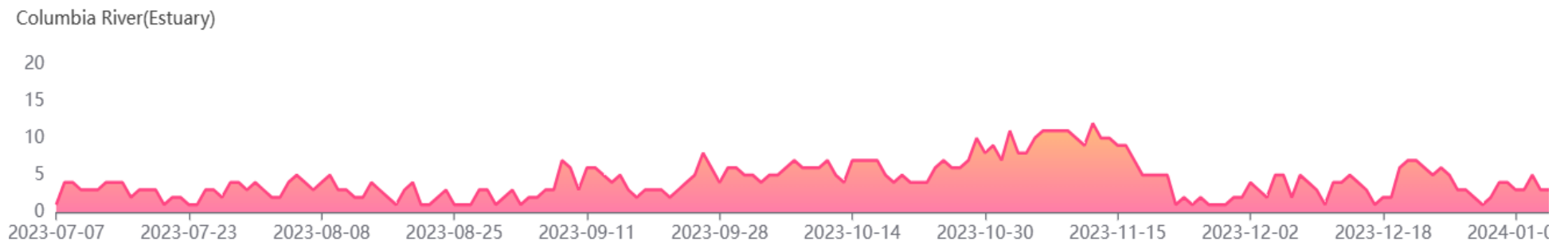
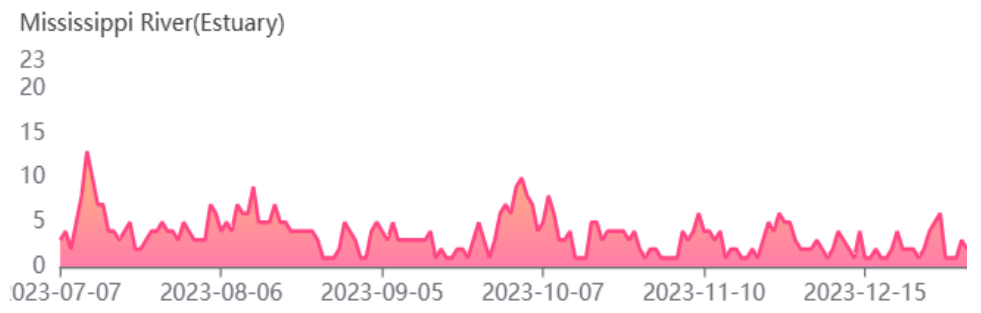
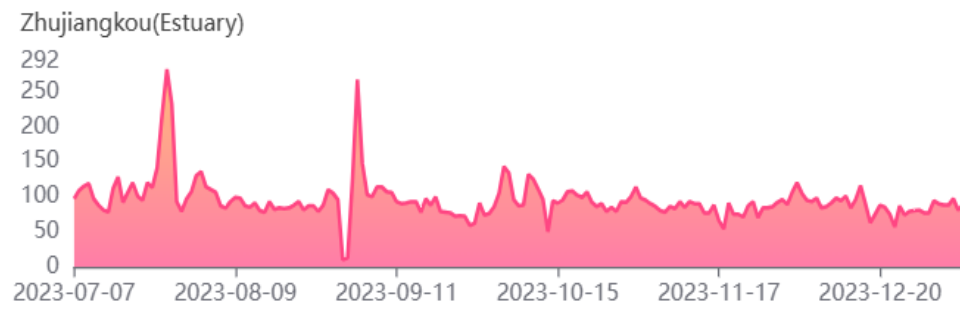
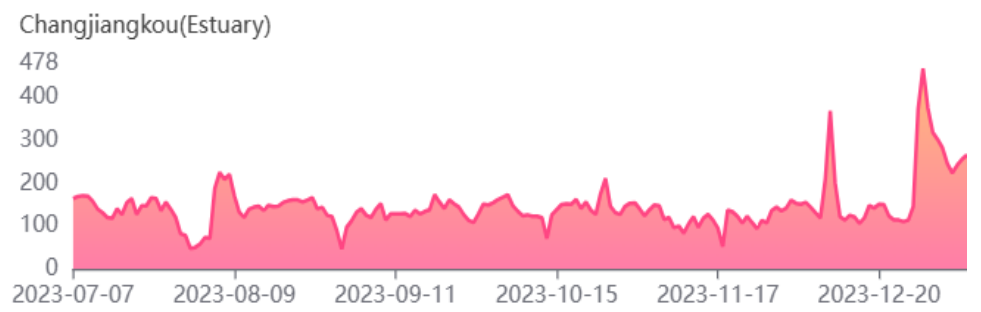
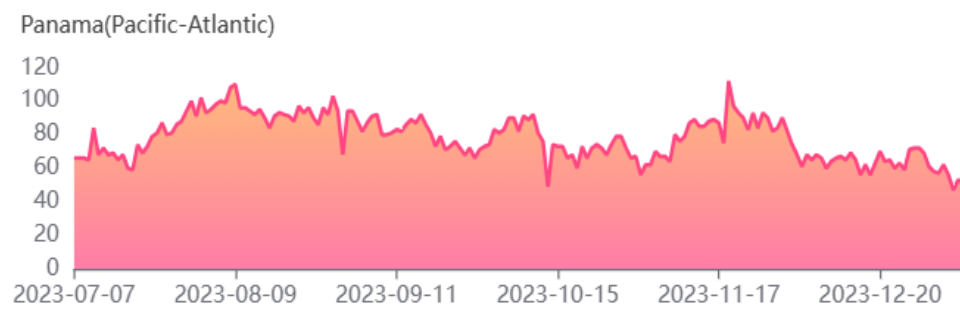
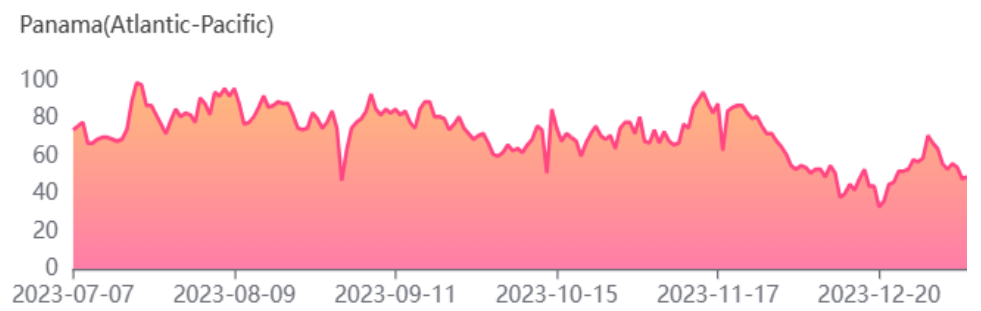
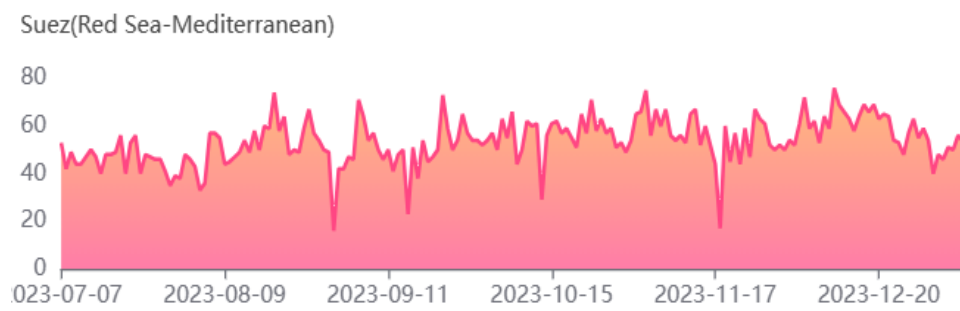
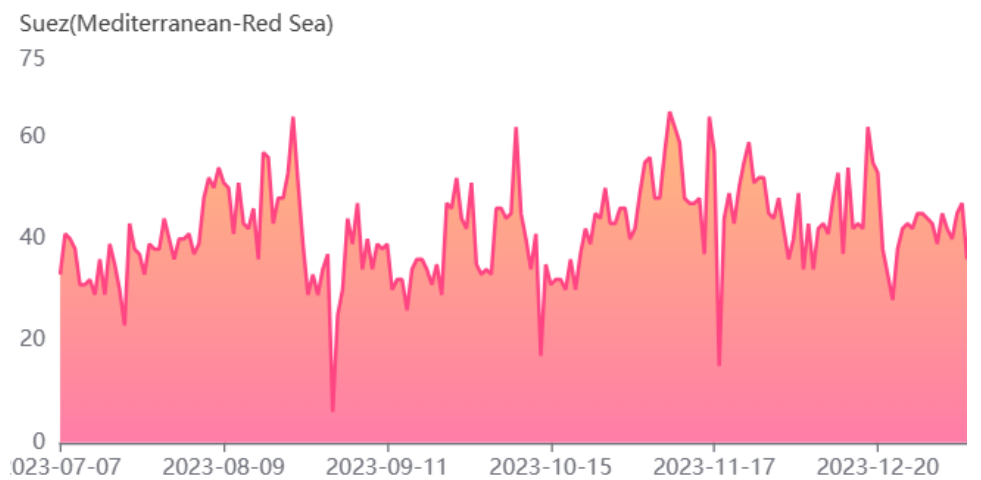
本报告数据截止时间为2024年1月7日北京时间17点；所有数据和或观点仅供参考，在任何情况下本公司及其员工不承担任何风险。The data deadline for this report is Beijing time 17 hours on January 7 of 2024; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

第二部分 航运数据 SHIPPING DATA

最近一周船舶运河/河口锚地等待数量

Latest Week Update Vessel Waiting Numbers Information in Anchorages of Canals and Rivers

Canal/Riv.	P.N.	M.N.	WoW	MoM
Suez.Red	53	1692	-31	92
Miss.Riv.	2	54	5	-15
CJK	266	5941	118	2023
Pa.Atlan.	49	1469	-22	-603
Colum.Riv.	3	107	0	-16
Suez.Med.	36	1265	-5	-46
Pa.Pac.	53	1797	-87	-568
ZJK	82	2476	59	-37

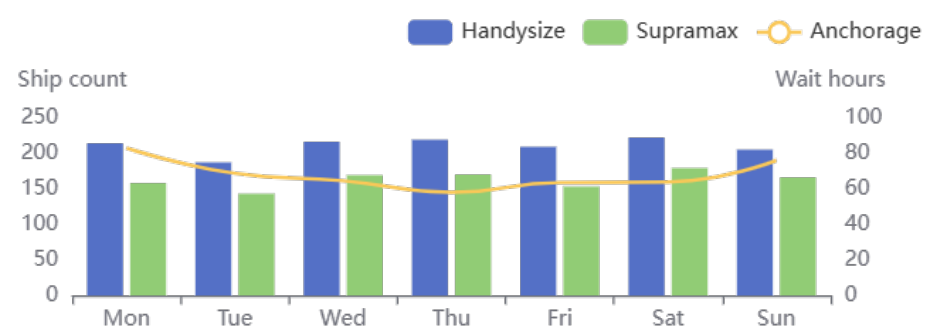


(P.N.-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

最近一周中国区域超大灵便型散货船和灵便型散货船舶锚泊数量和平均锚泊时长

Latest Week Update for Supra and Handy Num. and Waiting Time Information in Anchorages of China

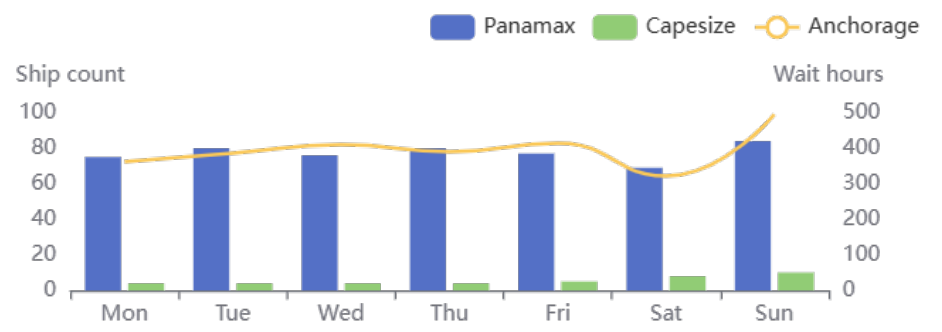
Type	M	T	W	Th	F	Sat	Sun
HDY	214	187	216	219	209	222	205
SMX	158	143	169	170	153	179	166
WT.h.	82.9	68.7	64.5	58	63.5	63.8	76



最近一周巴西区域好望角型和巴拿马型散货船舶锚泊数量和平均锚泊时长

Latest Week Update for Capesize and Panamax Num. and Waiting Time Information in Anchorages of Brazil

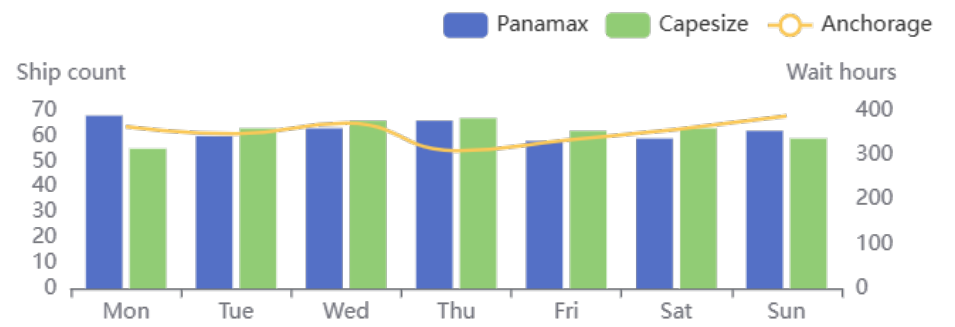
Type	M	T	W	Th	F	Sat	Sun
Pan.	75	80	76	80	77	69	84
Cap	4	4	4	4	5	8	10
WT.h.	362.1	386.1	410.1	390.2	414.2	321.6	495



最近一周澳大利亚区域好望角型和巴拿马型散货船舶锚泊数量和平均锚泊时长

Latest Week Update for Capesize and Panamax Num. and Waiting Time Information in Anchorages of Australia

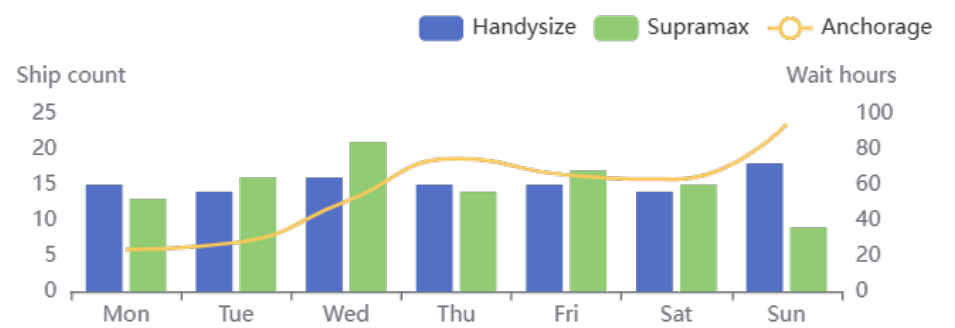
Type	M	T	W	Th	F	Sat	Sun
Pan.	68	60	63	66	58	59	62
Cap	55	63	66	67	62	63	59
WT.h.	364	347.9	371.9	309.9	333.9	357.9	388



最近一周黑海区域超大灵便型散货船和灵便型散货船舶锚泊数量和平均锚泊时长

Latest Week Update for Supra & Handy Num. and Waiting Time Information in Anchorages of Black Sea

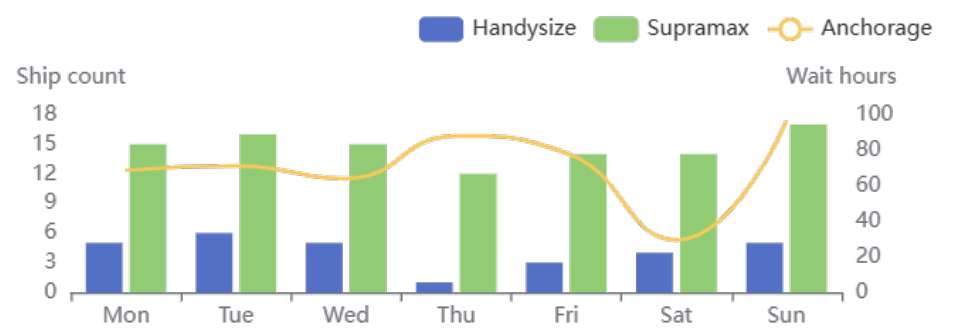
Type	M	T	W	Th	F	Sat	Sun
HDY	15	14	16	15	15	14	18
SMX	13	16	21	14	17	15	9
WT.h.	23.6	27.5	50.7	74.7	65.5	63.1	94



最近一周美湾区域超大灵便型散货船和灵便型散货船舶锚泊数量和平均锚泊时长

Latest Week Update for Supra and Handy Num. and Waiting Time Information in Anchorages of US Gulf

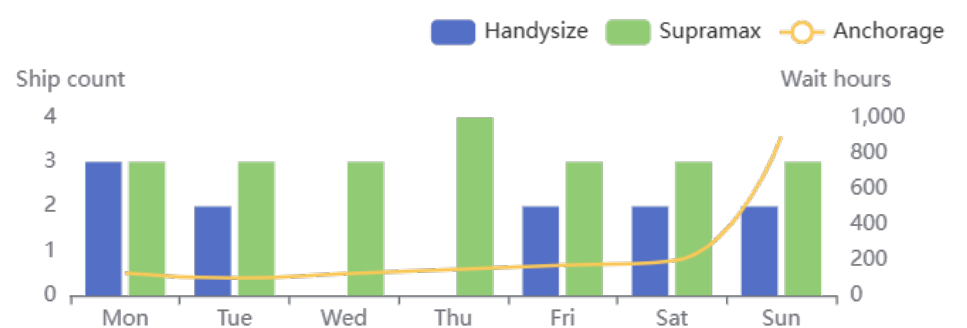
Type	M	T	W	Th	F	Sat	Sun
HDY	5	6	5	1	3	4	5
SMX	15	16	15	12	14	14	17
WT.h.	68.7	71.2	64.1	88.1	78.4	29.5	96.5



最近一周拉普拉特河区域超大型散货船和灵便型散货船舶锚泊数量和平均锚泊时长

Latest Week Update for Supra and Handy Num. and Waiting Time Information in Anchorages of Plate River

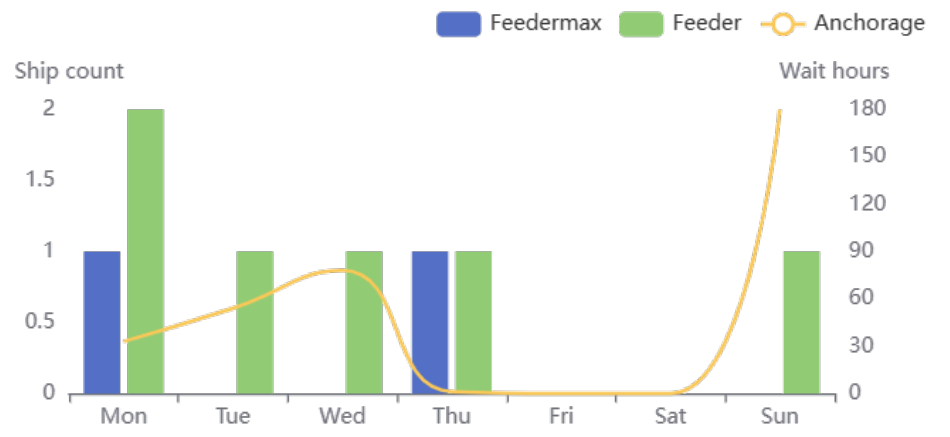
Type	M	T	W	Th	F	Sat	Sun
HDY	3	2	0	0	2	2	2
SMX	3	3	3	4	3	3	3
WT.h.	125.6	97.3	121.3	145.3	169.3	193.3	893



最近一周香港区域集装箱船锚泊数量和平均等待时长

Latest Week Update for Container Vessels Num. and Waiting Time Information on Anchorages of HongKong

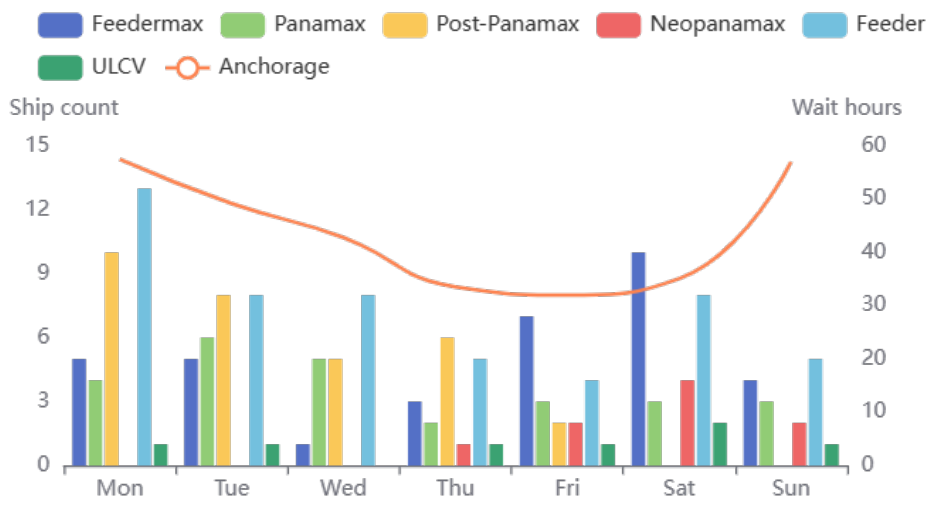
Type	M	T	W	Th	F	Sat	Sun
F.ma.	1	0	0	1	0	0	0
Pan.	0	0	0	0	0	0	0
PPx	0	0	0	0	0	0	0
NPx	0	0	0	0	0	0	0
Fd	2	1	1	1	0	0	1
WT.h.	33	54	78	1.1	0.0	0.0	180
Ulcw	0	0	0	0	0	0	0



最近一周上海区域集装箱船锚泊数量和平均等待时长

Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Shanghai

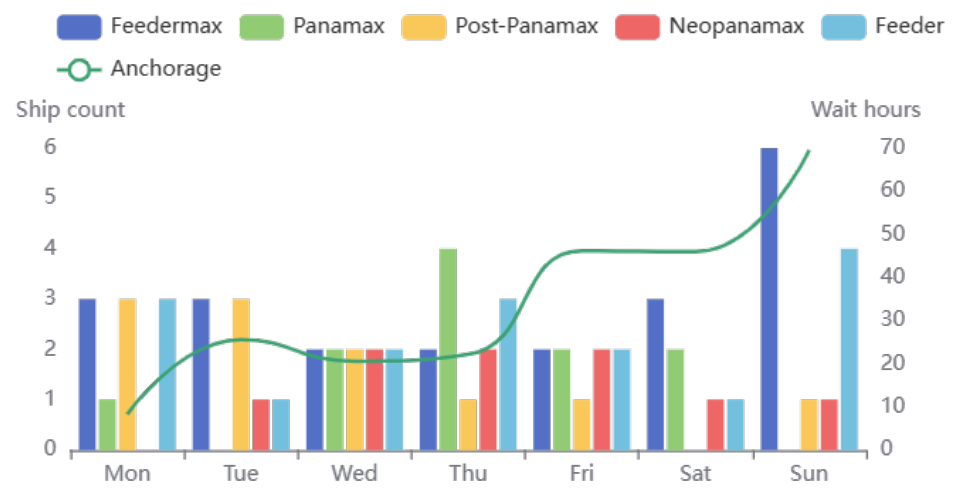
Type	M	T	W	Th	F	Sat	Sun
F.ma.	5	5	1	3	7	10	4
Pan.	4	6	5	2	3	3	3
PPx	10	8	5	6	2	0	0
NPx	0	0	0	1	2	4	2
Fd	13	8	8	5	4	8	5
Ulcw	1	1	0	1	1	2	1
WT.h.	57.5	49.2	42.8	33.55	32	35.1	57



最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

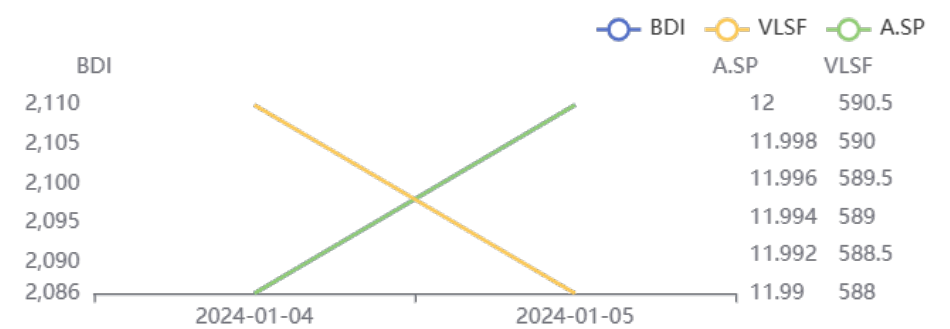
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

Type	M	T	W	Th	F	Sat	Sun
F.ma.	3	3	2	2	2	3	6
Pan.	1	0	2	4	2	2	0
PPx	3	3	2	1	1	0	1
NPx	0	1	2	2	2	1	1
Fd	3	1	2	3	2	1	4
Ulcw	0	0	0	0	0	0	0
WT.h.	8.3	25.6	20.6	22.2	46.2	46	69.5



最近一周空载散货船平均航速 Latest Weekly Average Speed for Bulkers during Ballast Voyage

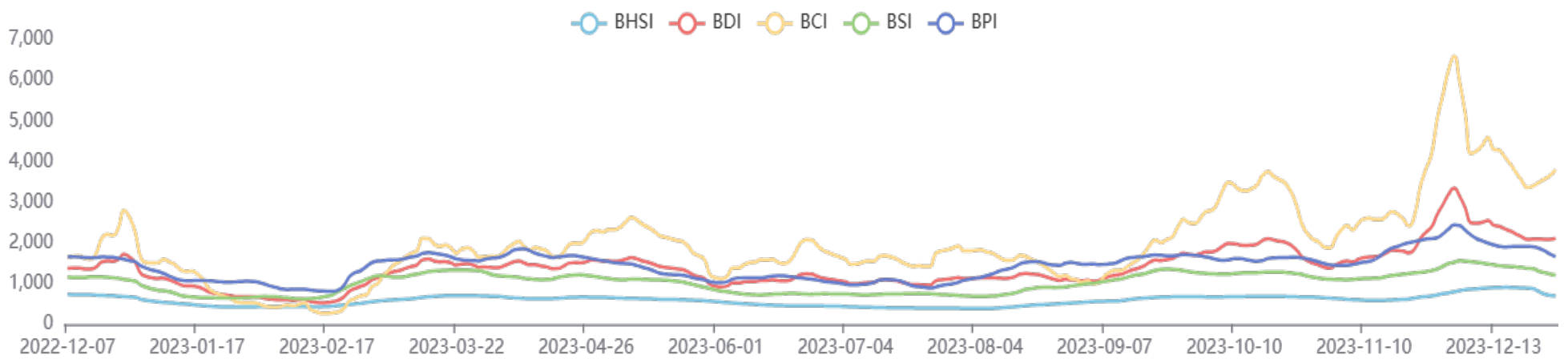
Type	M	T	W	Th	F	Sat	Sun
BDI	1872	1808	1727	1666			
VLSF	590.5	588					
A.SP	12.06	12.09	12.1	11.99	12.0	11.96	



第三部分 航运市场 SHIPPING MARKET

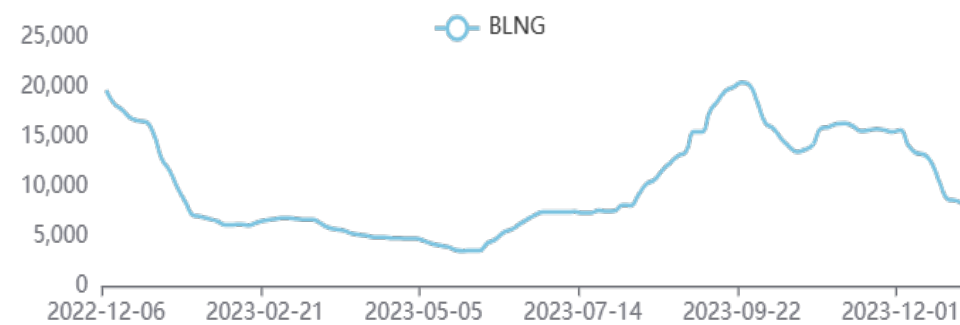
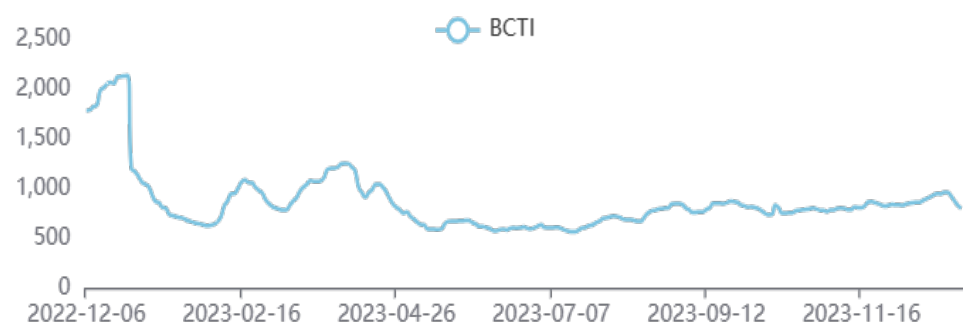
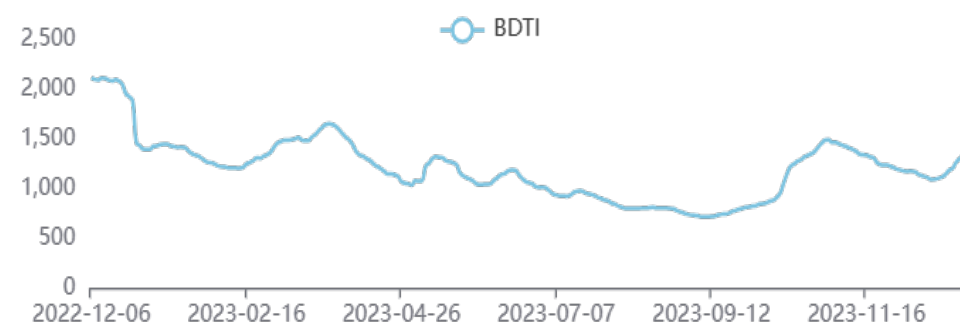
波罗的海干散货指数Baltic Dry Index

Type	PI	WoW	W%	M%	y%
BDI	2110	2110.0	N/A	-15.02	84.12
BCI	3798	3798.0	N/A	-10.82	152.53
BPI	1666	1666.0	N/A	-20.82	25.08
BSI	1212	1212.0	N/A	-20.32	39.15
BHSI	695	695.0	N/A	-20.3	21.72

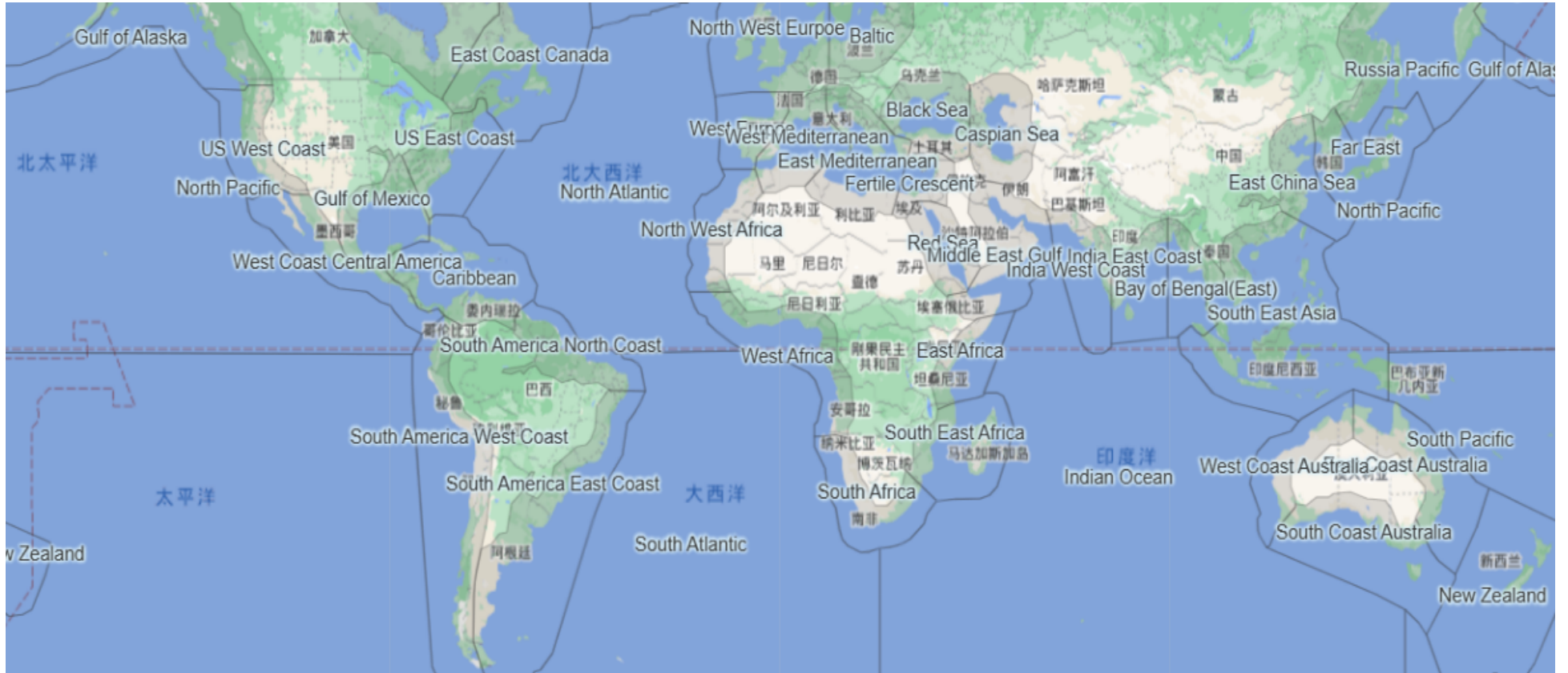


能源运价指数Energy Shipping Index

Type	PI	WoW	W%	M%	y%
BDTI	1384	1384.0	N/A	22.59	-0.86
BCTI	799	799.0	N/A	-6.88	-28.98
BLNG	8207	8207.0	N/A	-38.52	-35.67
BLPG	13393	13393.0	N/A	13.92	110.15



第四部分 运力分布 SUPPLY DISTRIBUTION

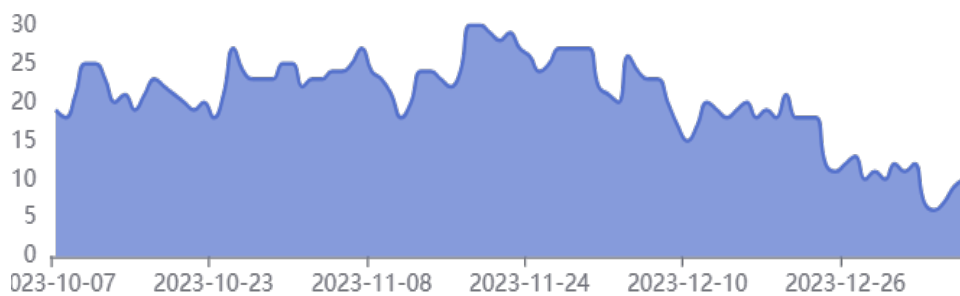


好望角型散货船 Capesize

区域：巴西，最近一周好望角型散货船准备装货船舶数量

Area: Brazil, The latest week update number for Capesize with cargo loading intention.

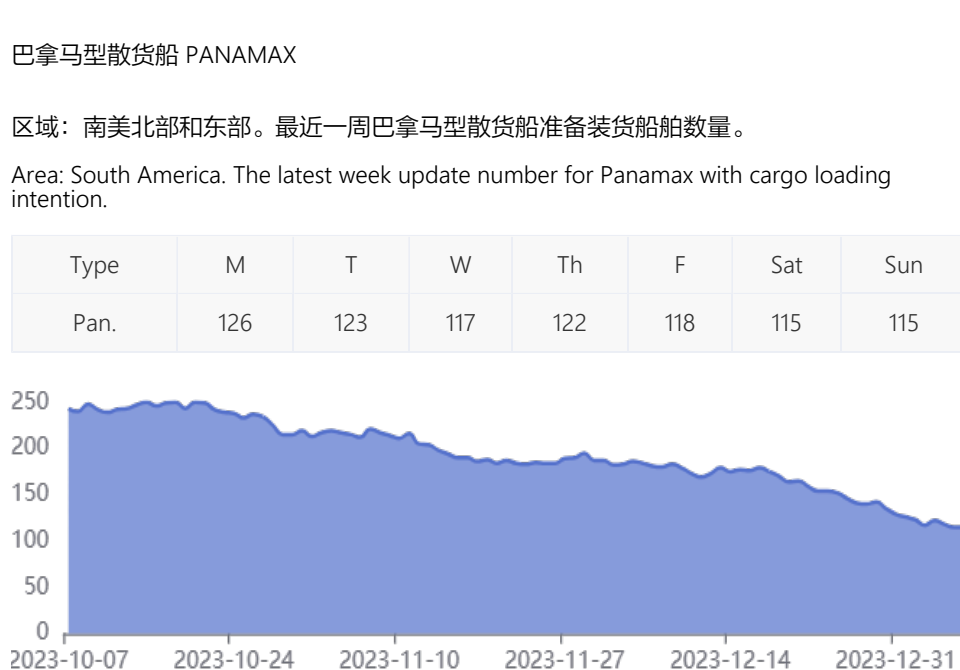
Type	M	T	W	Th	F	Sat	Sun
Cape	11	12	7	6	7	9	10



区域：南非，最近一周好望角型散货船准备装货船舶数量

Area: South Africa, The latest week update number for Capesize with cargo loading intention.

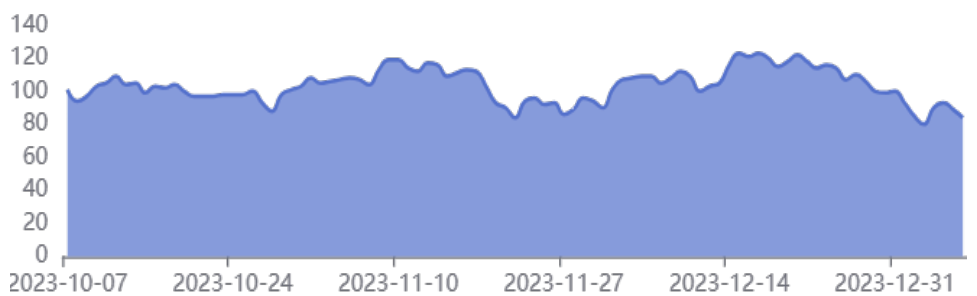
Type	M	T	W	Th	F	Sat	Sun
Cape	23	27	23	23	25	20	20



区域：澳大利亚。最近一周好望角型散货船准备装货船舶数量。

Area: Australia. The latest week update number for Capesize with cargo loading intention.

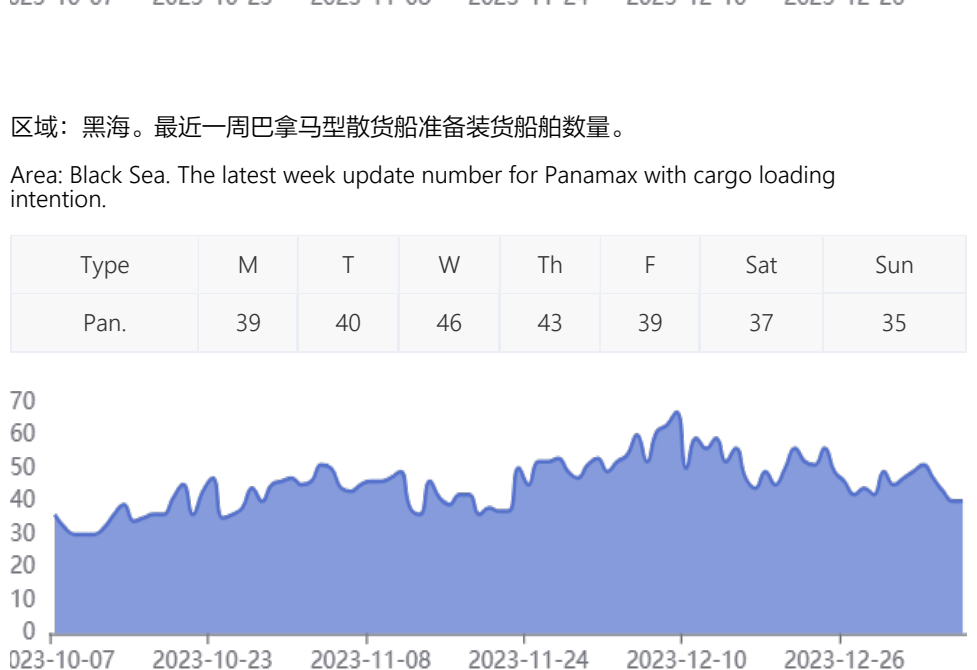
Type	M	T	W	Th	F	Sat	Sun
Cape	93	85	80	90	93	89	84



区域：黑海。最近一周巴拿马型散货船准备装货船舶数量。

Area: Black Sea. The latest week update number for Panamax with cargo loading intention.

Type	M	T	W	Th	F	Sat	Sun
Pan.	39	40	46	43	39	37	35

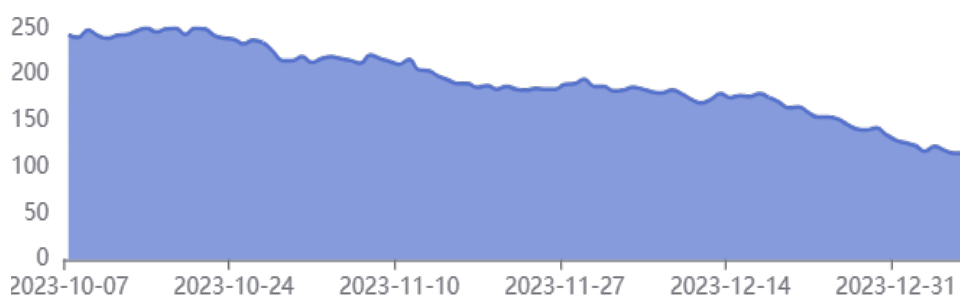


巴拿马型散货船 PANAMAX

区域：南美北部和东部。最近一周巴拿马型散货船准备装货船舶数量。

Area: South America. The latest week update number for Panamax with cargo loading intention.

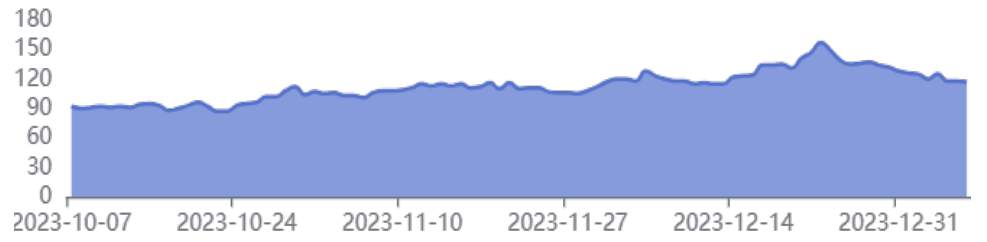
Type	M	T	W	Th	F	Sat	Sun
Pan.	126	123	117	122	118	115	115



区域：澳大利亚。最近一周巴拿马型散货船准备装货船舶数量。

Area: Australia. The latest week update number for Panamax with cargo loading intention.

Type	M	T	W	Th	F	Sat	Sun
Pan.	126	125	120	125	118	118	117

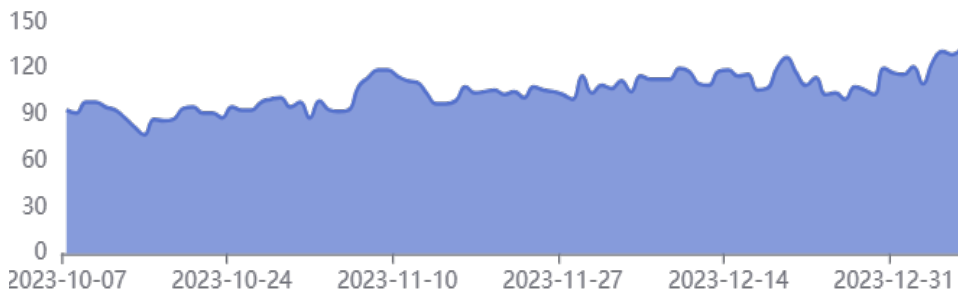


超大灵便型散货 SUPRAMAX

区域：北中国。最近一周超大灵便型散货船准备装货船舶数量。

Area: North China. The latest week update number for Supramax with cargo loading intention.

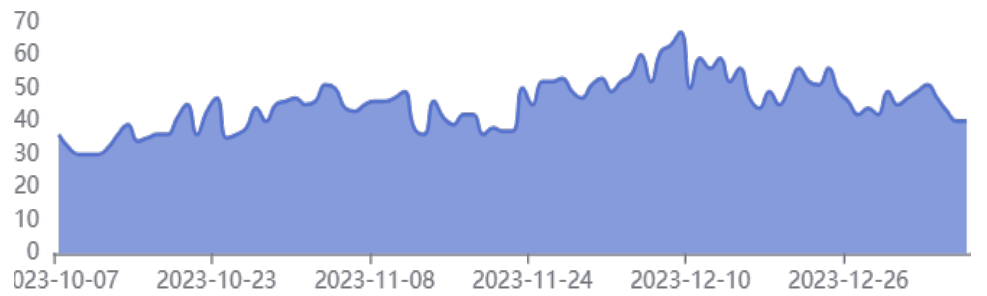
Type	M	T	W	Th	F	Sat	Sun
SMX	116	121	110	124	131	129	133



区域：黑海。最近一周巴拿马型散货船准备装货船舶数量。

Area: Black Sea. The latest week update number for Panamax with cargo loading intention.

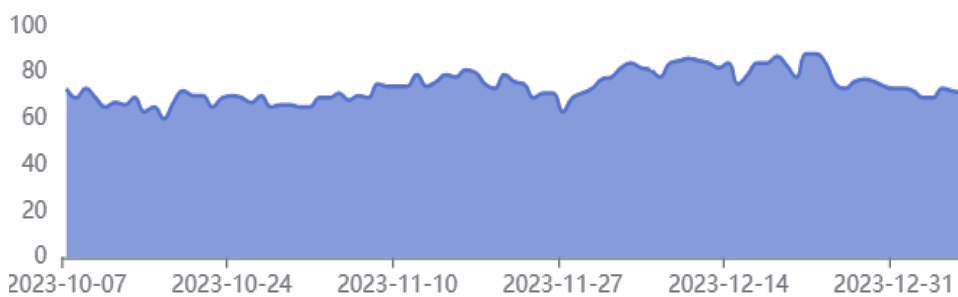
Type	M	T	W	Th	F	Sat	Sun
SMX	47	49	51	47	43	40	40



区域：美湾。最近一周超大灵便型散货船准备装货船舶数量。

Area: US Gulf. The latest week update number for Supramax with cargo loading intention.

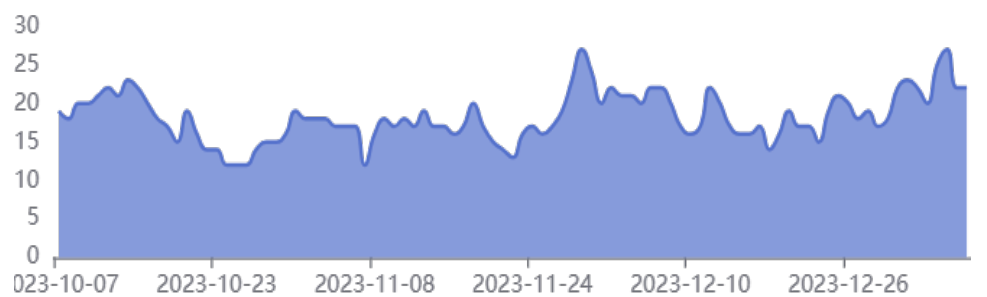
Type	M	T	W	Th	F	Sat	Sun
SMX	23	22	20	25	27	22	22



区域：南美的北部和东部。最近一周超大灵便型散货船准备装货船舶数量。

Area: South America. The latest week update number for Supramax with cargo loading intention.

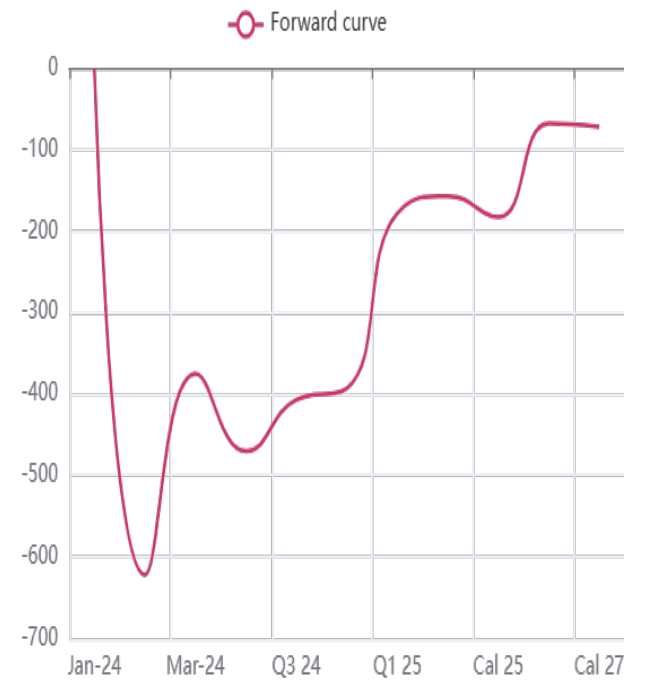
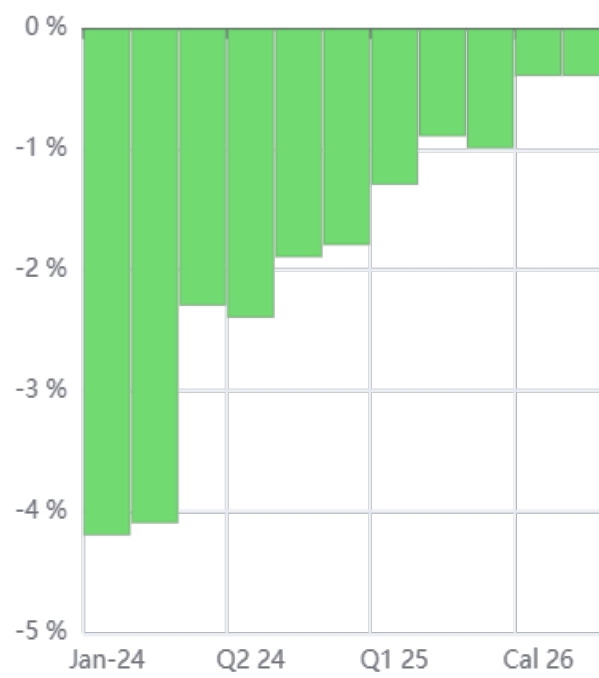
Type	M	T	W	Th	F	Sat	Sun
SMX	73	72	69	69	73	72	71



第五部分 远期运价协议 FFA

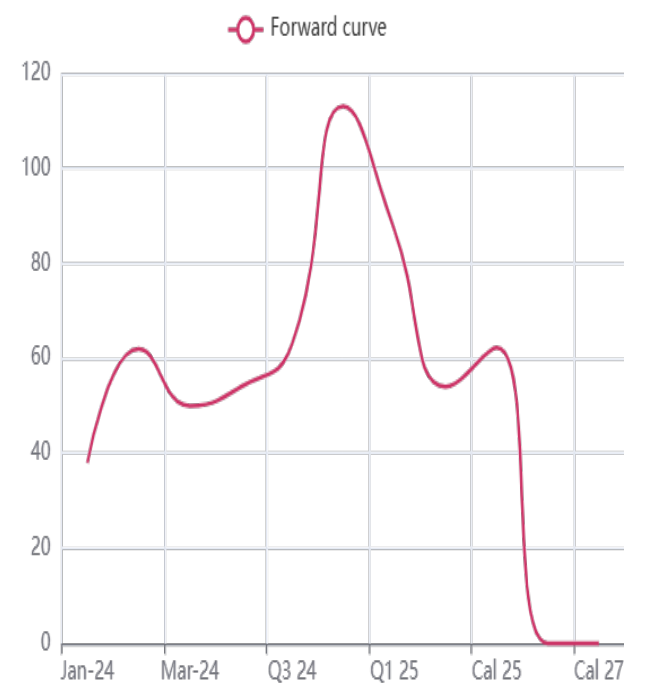
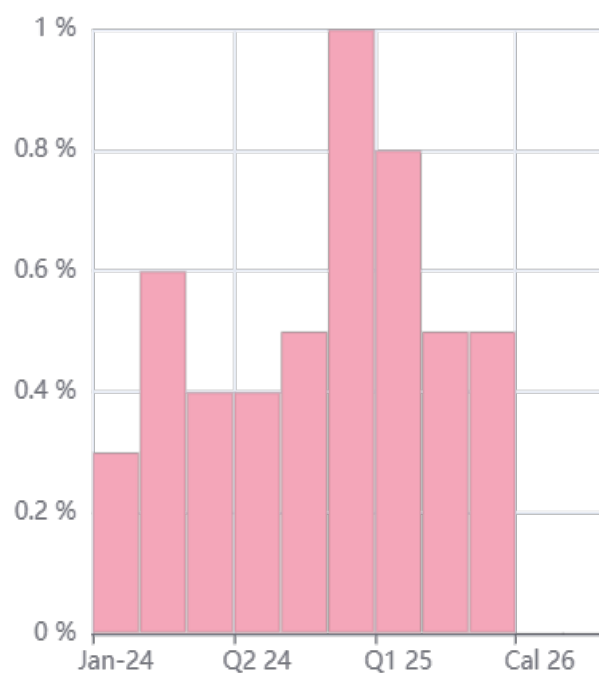
好望角型散货船Capesize

5TC	\$/day	WoW	
Jan-24	23,021.00	-1008.0	-4.2 %
Feb-24	14,564.00	-622.0	-4.1 %
Mar-24	15,789.00	-375.0	-2.3 %
Q2 24	19,223.67	-470.33	-2.4 %
Q3 24	21,261.00	-407.0	-1.9 %
Q4 24	21,493.00	-393.0	-1.8 %
Q1 25	13,536.00	-178.0	-1.3 %
Q2 25	17,157.00	-157.0	-0.9 %
Cal 25	17,946.00	-183.0	-1.0 %
Cal 26	17,561.00	-68.0	-0.4 %
Cal 27	17,407.00	-72.0	-0.4 %



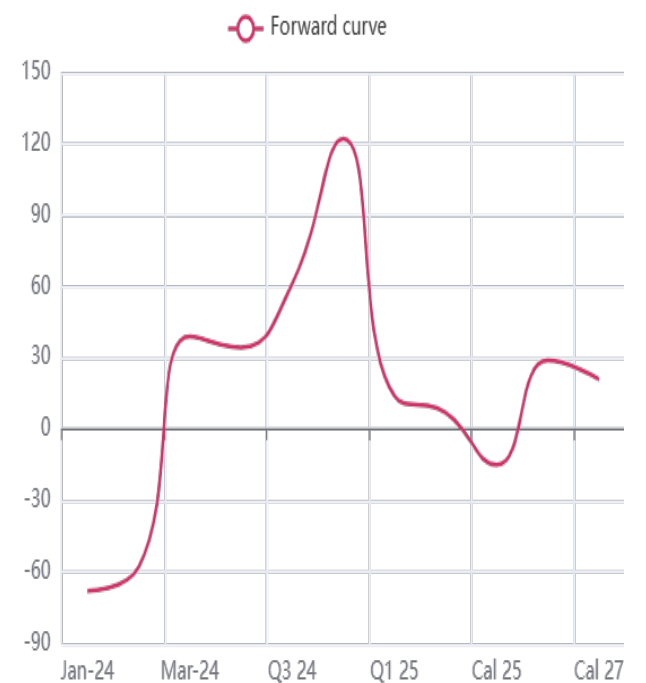
灵便型散货船Handysize

7TC	\$/day	WoW	
Jan-24	11,988.00	38.0	0.3 %
Feb-24	10,900.00	62.0	0.6 %
Mar-24	12,063.00	50.0	0.4 %
Q2 24	12,721.00	54.0	0.4 %
Q3 24	12,213.00	63.0	0.5 %
Q4 24	11,863.00	113.0	1.0 %
Q1 25	11,100.00	87.0	0.7 %
Q2 25	11,967.00	54.0	0.5 %
Cal 25	11,750.25	62.25	0.5 %
Cal 26	11,463.00	0.0	0.0 %
Cal 27	11,438.00	0.0	0.0 %



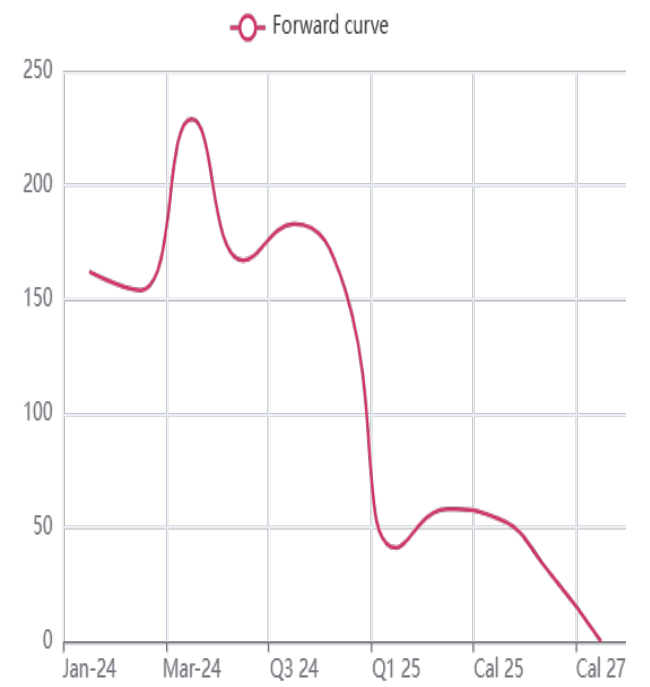
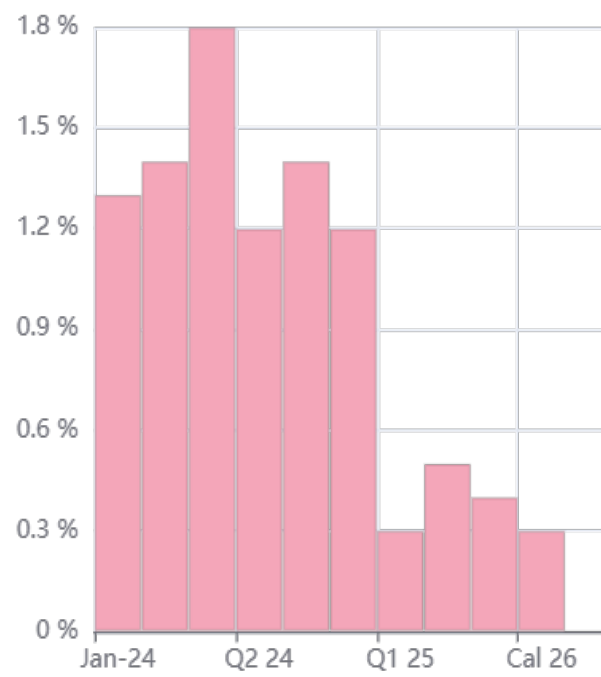
巴拿马型散货船Panamax

4TC	\$/day	WoW	
Jan-24	12,939.00	-68.0	-0.5 %
Feb-24	11,821.00	-58.0	-0.5 %
Mar-24	13,543.00	39.0	0.3 %
Q2 24	14,260.67	34.33	0.2 %
Q3 24	13,757.00	61.0	0.4 %
Q4 24	13,386.00	122.0	0.9 %
Q1 25	11,807.00	14.0	0.1 %
Q2 25	12,850.00	7.0	0.1 %
Cal 25	12,271.00	-15.0	-0.1 %
Cal 26	11,979.00	29.0	0.2 %
Cal 27	11,950.00	21.0	0.2 %



超大灵便型散货船Supramax

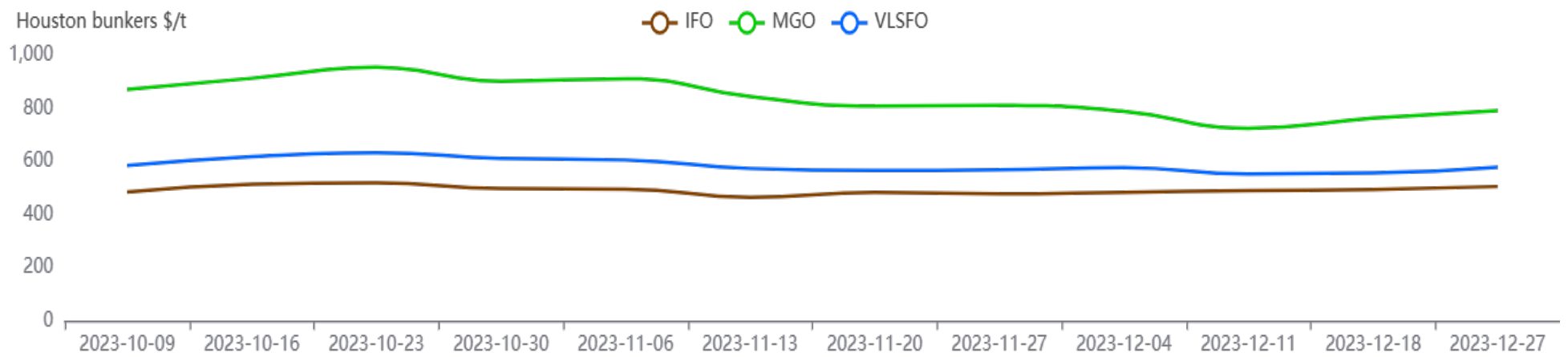
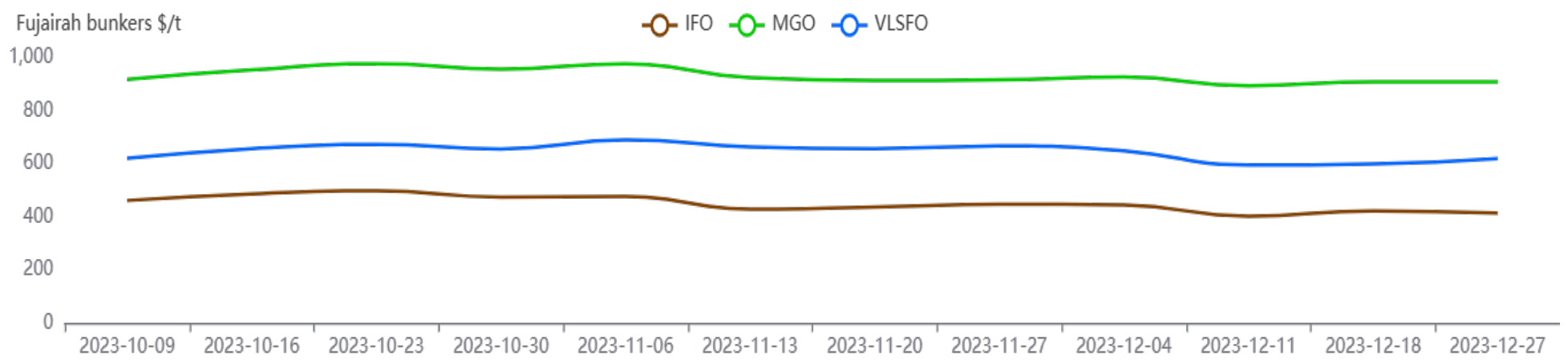
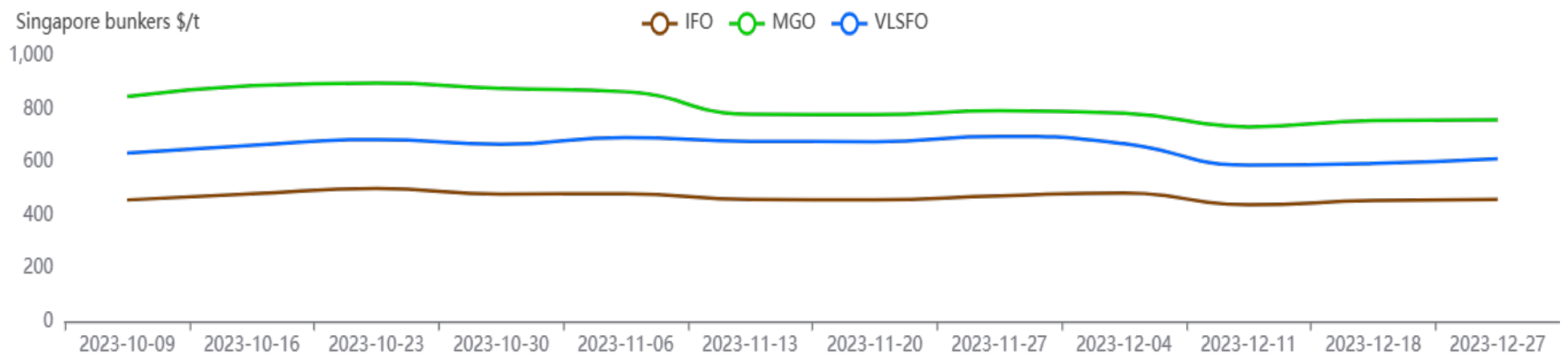
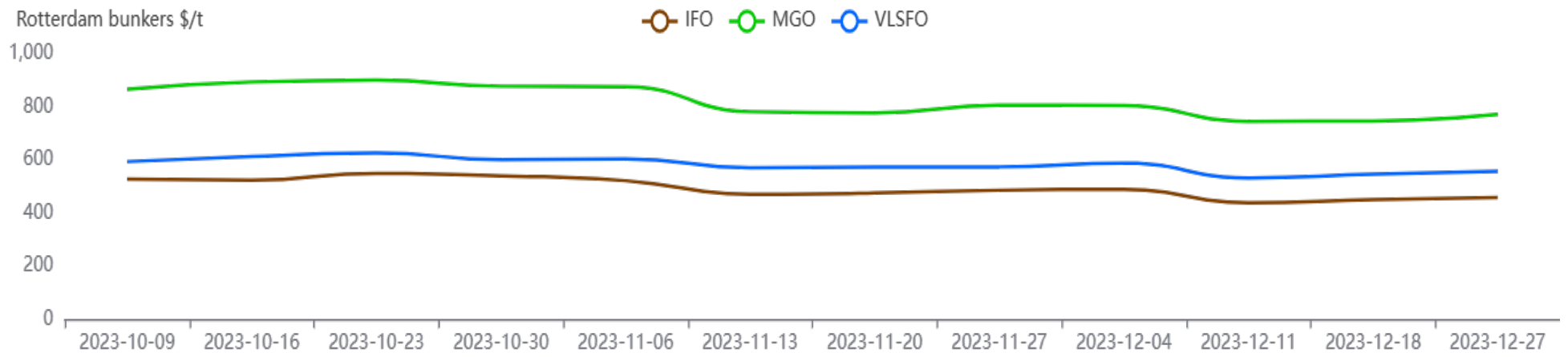
10TC	\$/day	WoW	
Jan-24	12,458.00	162.0	1.3 %
Feb-24	11,529.00	154.0	1.4 %
Mar-24	12,983.00	229.0	1.8 %
Q2 24	13,528.00	167.0	1.2 %
Q3 24	13,083.00	183.0	1.4 %
Q4 24	12,808.00	154.0	1.2 %
Q1 25	11,833.00	41.0	0.3 %
Q2 25	12,217.00	58.0	0.5 %
12,121.00	Cal 25	53.75	0.4 %
Cal 26	11,938.00	30.0	0.3 %
Cal 27	11,858.00	0.0	0.0 %



第六部分 燃油价格 BUNKER PRICE

MP	LO	HO	MO	SP	WoW	W%	M%

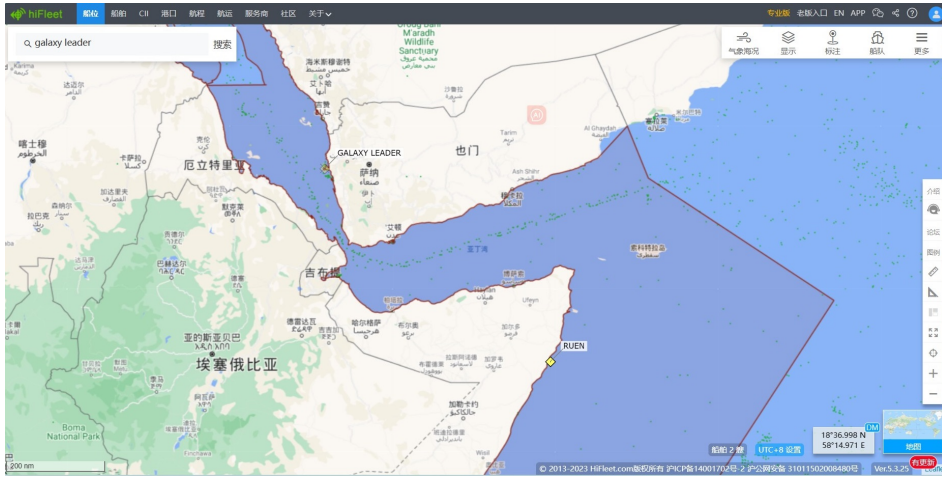
(MP-Bunkering Main Ports; LO-Heavy Low Sulphur Fuel Oil; HO-Heavy High Sulphur Fuel Oil; MO-MGO; SP-Spread;)



第七部分 最新商品价格 LATEST COMMODITIES PRICE

Grains and Oilseeds	Index	+/-	Weekly	Monthly	YTD
Wheat					
Maize					
Soybeans					
Rice					
Barley					
Energy	Index	+/-	Weekly	Monthly	YTD
Crude Oil					
Brent					
Natural Gas					
Gasoline					
Heating Oil					
Ethanol					
Naphtha					
Propane					
Uranium					
Methanol					
TTF Gas					
UK Gas					
Industrial	Index	+/-	Weekly	Monthly	YTD
Copper					
Coal					
Steel					
Iron Ore					
Aluminum					
Iron Ore Fe 62%					
Metals	Index	+/-	Weekly	Monthly	YTD
Gold					
Silver					
Platium					
Currencies	Index	+/-	Weekly	Monthly	YTD

第八部分 本周话题 WEEKLY TOPIC



船舶劫持事件抬头

自从2023年12月14日一艘保加利亚灵便散货船RUEN号在距离索马里700海里的阿拉伯海被劫持以来，船东协会重新考量印度洋的高风险，并发出了安全提醒。十多年前，在索马里海盗活动最猖獗的时期，海盗们将独桅帆船作为“母舰”，对远离海岸的商船发动袭击。据hiFleet最近的AIS数据显示，被索马里海盗劫持的散货船RUEN号还停留在索马里以东领海内，为了释放该船，多方都在周旋谈判中，目前劫机者的确切要求尚没有公开报道。这之前，2023年11月19日，为支持加沙地带的巴勒斯坦抵抗组织，胡塞组织武装人员在红海劫持了一艘悬挂巴哈马国旗的大型货船“GALAXY LEADER”，据称该船属于一家以色列公司。据hiFleet最新数据，该船依然停泊在卡马兰岛附近港湾锚地，时间一晃已超过1个月，多方渠道正在和胡塞武装沟通以图尽快释放船员和船舶。这两艘船的船员还在煎熬时，根据hiFleet数据显示，2024年1月2号又一艘新加坡船东的化学品船在赤道几内亚外海被海盗所劫持，该船悬挂图瓦卢船旗，13000载重吨，2007年韩国建造。事故发生时，该船的速度从11节迅速降到0节，1小时后又恢复航行。根据hiFleet最新AIS信息显示，该船目前已经停靠在喀麦隆西南部港口博纳贝里，处于被劫持状态。1月4号，距离索马里Eyl东南方向约455海里，一艘航行中的散货船在雷达上发现了海盗船。海盗手持机关枪和火箭筒向该船开火。船长随即发出了警报，启动了SSAS，所有船员进入了船舶安全堡垒。附近的印度军舰很快做出反应，立即派出直升机前往事发地点，并成功登船对海盗进行了扫荡。获得安全信息后，船员们从堡垒中出来，又重新控制了这艘船，目前

该船恢复航线并所有船员都安全。

海盗劫持船舶正在变得十分严峻，为了应对海盗劫持船舶，国际组织一方面采取报告和护航的举措，一方面也指导船舶建立安全堡垒等保安措施，但是海盗或地方武装的劫持行动显得更加有组织而迅速快捷，甚至在救援来到前发现船员的安全舱室并控制船员。这些需要引起相关组织和船东的高度关注。

Since the hijacking of the Bulgarian handy bulk RUEN in the Arabian Sea 700 nautical miles off Somalia on December 14, 2023, shipowners' associations have reconsidered the high risks in the Indian Ocean and issued safety alerts. When high frequency of Somali piracy decade ago, pirates used dhows as "motherships" to launch attacks on merchant ships far from the coast. According to the latest AIS data from hiFleet, the bulk carrier RUEN hijacked by Somali pirates is still staying in the territorial waters east of Somalia, in order to release the ship, the parties are in negotiations, the exact demands of the hijackers have not been publicly reported.

On November 19, 2023, in support of Palestinian resistance groups in the Gaza Strip, Houthi fighters hijacked a large Bahamian-flagged cargo ship "GALAXY LEADER" in the Red Sea, allegedly belonging to an Israeli company. According to the latest data from hiFleet, the ship is still anchored in the harbor anchorage near Kamalan Island, and the time has passed for over 1 month, and various channels are communicating with the Houthi armed forces to release the crew and the ship as soon as possible.

While the crews of the two ships are still suffering, according to hiFleet data, on January 2, 2024, another chemical tanker owned by Singapore owners was hijacked by pirates off the coast of Equatorial Guinea. The ship is Tuvalu flagged, 13,000 DWT, and was built in South Korea in 2007. At the time of the accident, the speed of the ship quickly dropped from 11 knots to 0 knots, and it resumed sailing an hour later. According to the latest AIS information from hiFleet, the ship has now docked in the southwestern Cameroonian port of Bonaberry and is in a state of hijacking.

On January 4, about 455 nautical miles southeast of Eyl, Somalia, a moving bulk carrier picked up the pirate ship on radar. Pirates armed with machine guns and rocket launchers opened fire on the ship. The captain then sounded the alarm, activated the SSAS, and all the crew entered the ship's safety fort. Nearby Indian warships quickly responded, immediately sent a helicopter to the site, and successfully boarded the ship to sweep up the pirates. After receiving safety information, the crew emerged from the fort and regained control of the ship, which is now back on course and all crew members are safe.

The hijacking of ships by pirates is becoming very serious. In order to deal with the hijacking of ships by pirates, international organizations on the one hand take the measures of reporting and escorting, on the other hand, they also guide the ships to establish security fortresses and other security measures, but the hijacking of pirates or local armed forces is becoming organized and quick. These need to attract the attention of relevant organizations and shipowners.