



2024年 第4周市场周报

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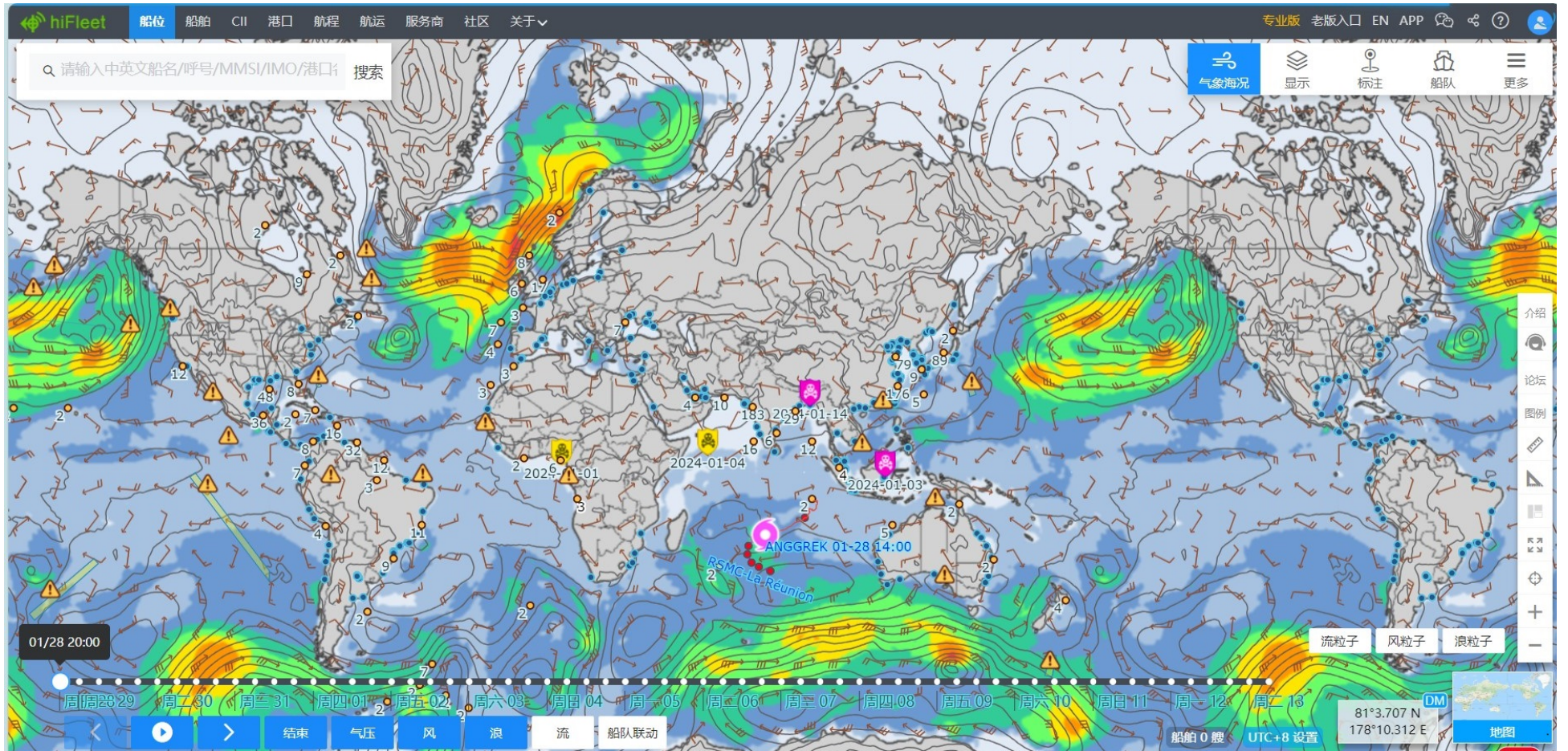
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本周话题 WEEKLY TOPIC

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989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 989 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

最近一周没有最新的海盗事件报道。No new piracy incidents have been reported in the last week.

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3-4级逐步增强到6-7级，相关海域海浪将从1米的轻浪到3米大浪；台湾海峡风力由6-7级减弱到5-6级，台湾海峡洋面海浪将经历3米大浪，南海大部海域风力维持在4-5级，有2中浪。辽东湾最大浮冰范围30-45海里；渤海湾、莱州湾最大浮冰范围10海里左右；黄海北部最大浮冰范围10-20海里。大西洋和太平洋北部区域低压活动加强，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 experience from gale to breeze. The sea in the Taiwan Strait happens to experience rough. In most of the South China Sea the wind are strong with rough sea. Low-pressure in the north of North Atlantic Ocean and Pacific is strong, rough sea conditions.

海上事件 Marine Incidents

据hiFleet数据显示，北京时间1月27日凌晨美国JP MORGAN投资的一艘阿芙拉成品油轮被胡赛武装一枚导弹击中甲板并起火。很快船员有组织的进行了灭火，最终船员扑灭了大火，所幸没有大的灾难发生，据说船上装载的是易燃的石脑油。该船下一个目的港新加坡，预计抵达时间2月7号。According to hiFleet data, in the early morning of January 27 Beijing time, an Aframax invested by the United States JP MORGAN was hit by a Houthi missile on the deck and caught fire. Soon the crew organized to put out the fire, fortunately no major disaster occurred, it is believed that the ship was carrying flammable naphtha. The ship's next destination is Singapore, and the expected arrival time is February 7.

备注 Remark

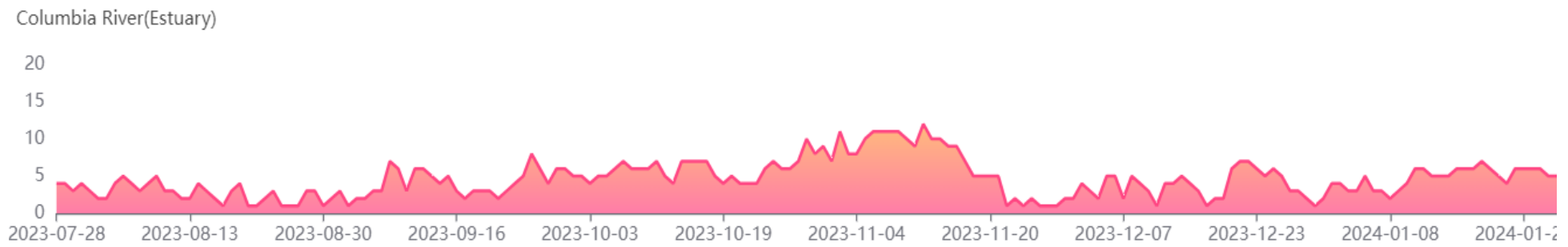
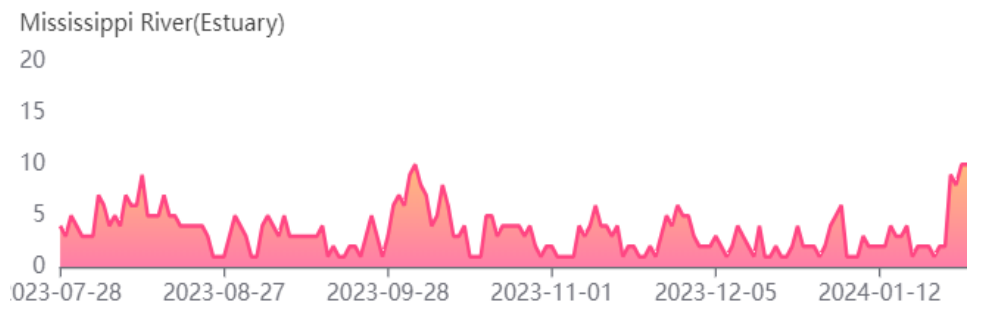
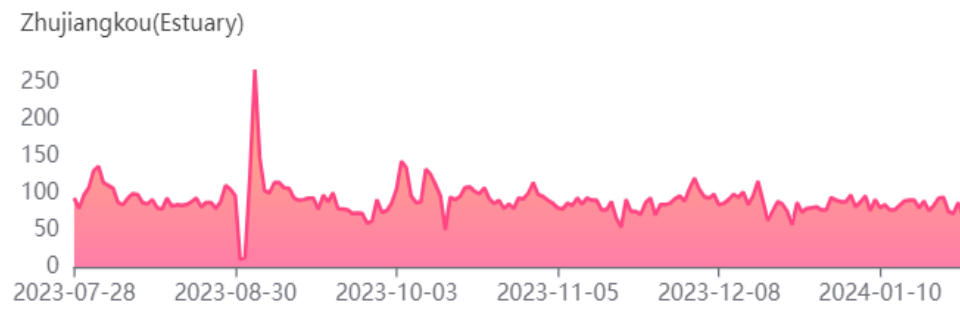
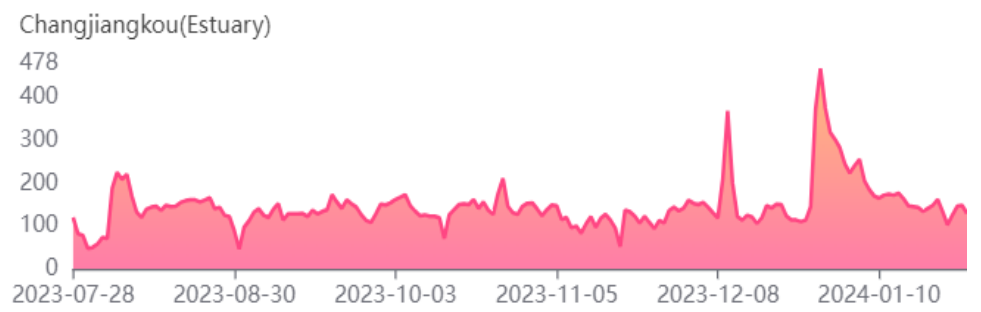
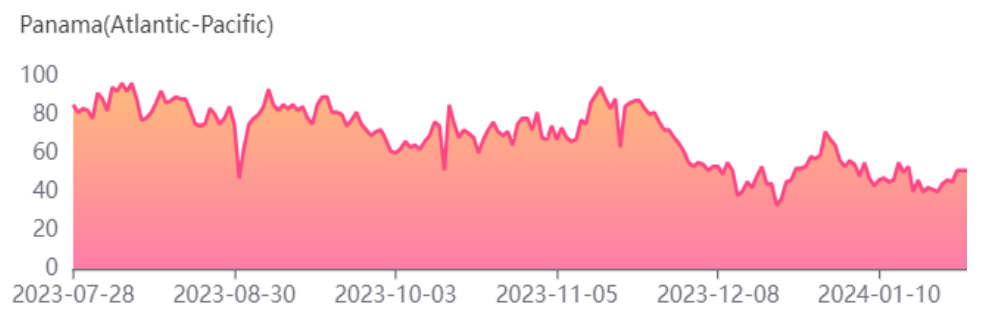
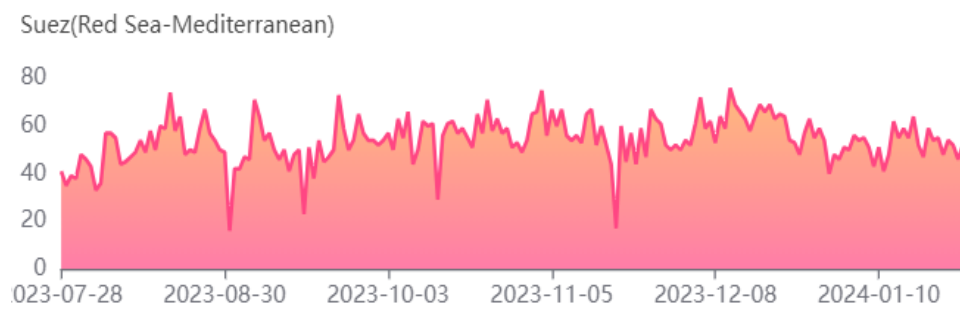
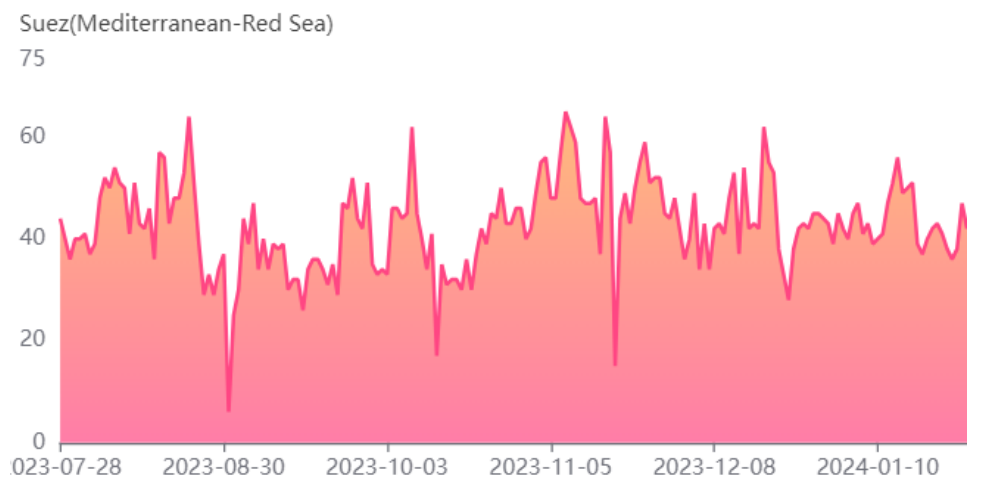
本报告数据截止时间为2024年1月28日北京时间17点；所有数据和或观点仅供参考，在任何情况下本公司及其员工不承担任何风险。The data deadline for this report is Beijing time 17 hours on January 28 of 2024; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

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	42	1490	-42	-267
Miss.Riv.	10	88	23	32
CJK	129	5259	-104	74
Pa.Atlan.	51	1422	2	-35
Colum.Riv.	5	137	-3	29
Suez.Med.	42	1252	-37	-4
Pa.Pac.	57	1487	-3	-382
ZJK	66	2443	-41	-100

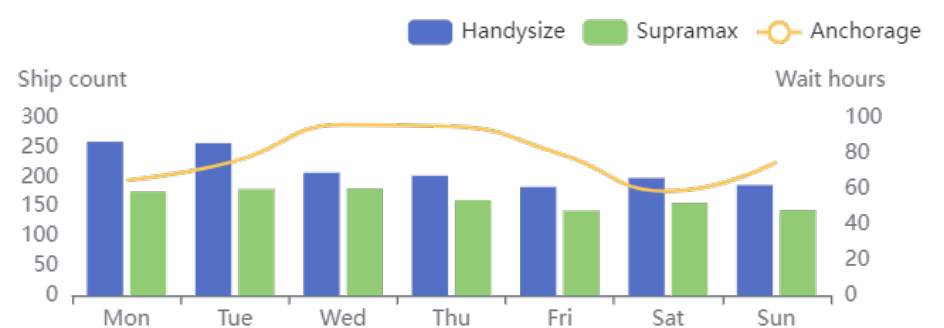


(P.N.-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

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

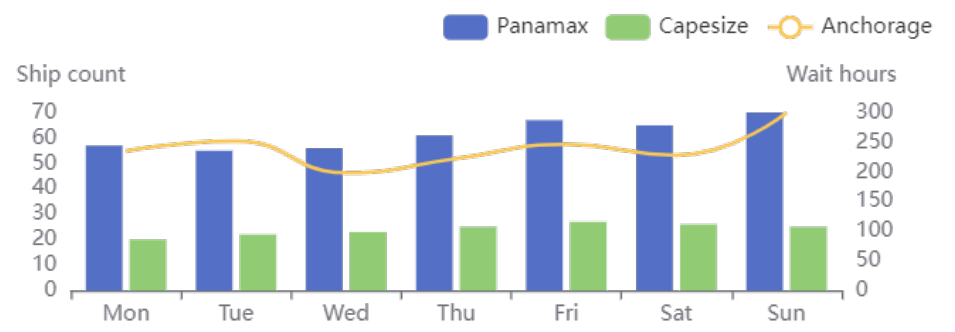
Type	M	T	W	Th	F	Sat	Sun
HDY	259	257	207	202	183	198	186
SMX	175	179	180	161	143	156	144
WT.h.	64.7	75.5	96.1	95.1	79.7	58.6	75



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

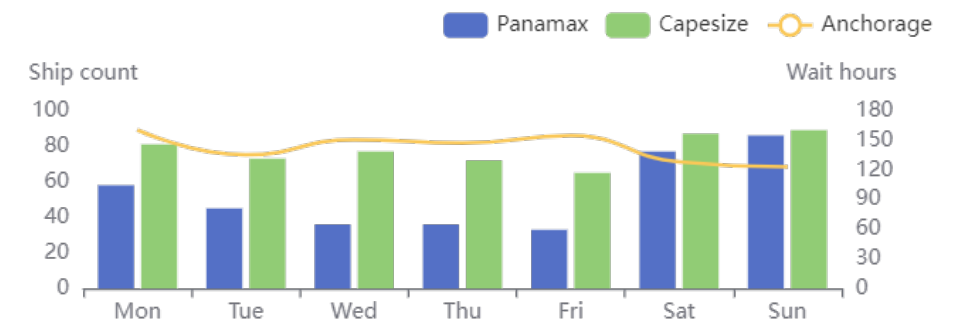
Type	M	T	W	Th	F	Sat	Sun
Pan.	57	55	56	61	67	65	70
Cap	20	22	23	25	27	26	25
WT.h.	235.4	252.1	198.5	222.5	246.5	228	300



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

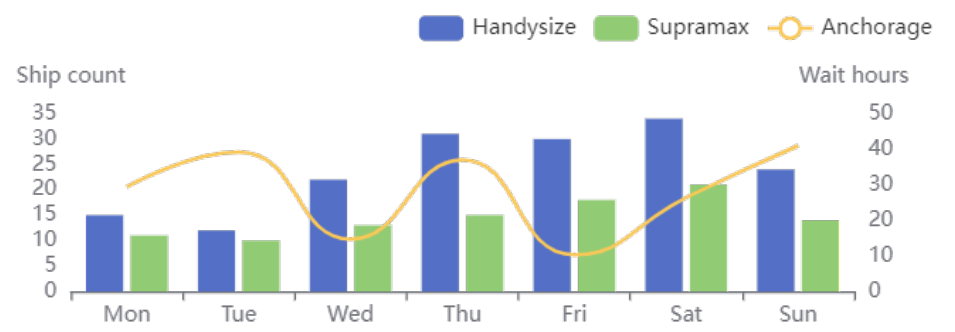
Type	M	T	W	Th	F	Sat	Sun
Pan.	58	45	36	36	33	77	86
Cap	81	73	77	72	65	87	89
WT.h.	160.5	135.2	150.6	147.2	154.7	128	123



最近一周黑海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 & Handy Num. and Waiting Time Information in Anchorages of Black Sea

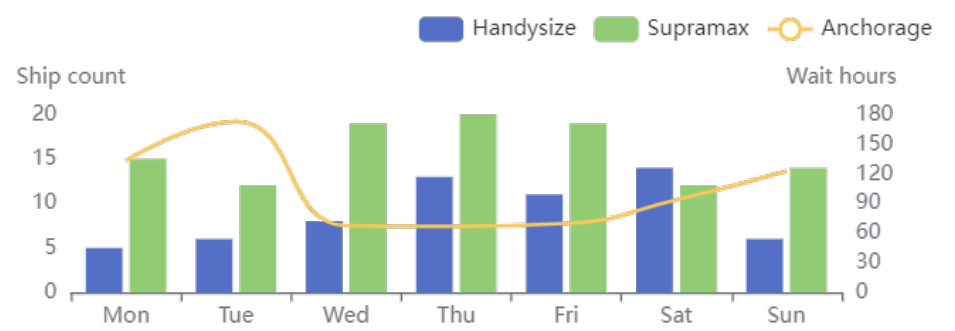
Type	M	T	W	Th	F	Sat	Sun
HDY	15	12	22	31	30	34	24
SMX	11	10	13	15	18	21	14
WT.h.	29.4	39.2	14.7	37	10.3	26.4	41



最近一周美湾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 US Gulf

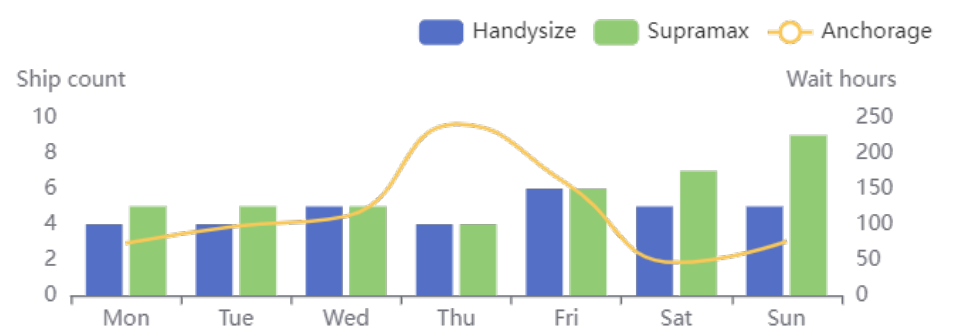
Type	M	T	W	Th	F	Sat	Sun
HDY	5	6	8	13	11	14	6
SMX	15	12	19	20	19	12	14
WT.h.	133.2	173	67.6	67	69.75	93.75	123



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

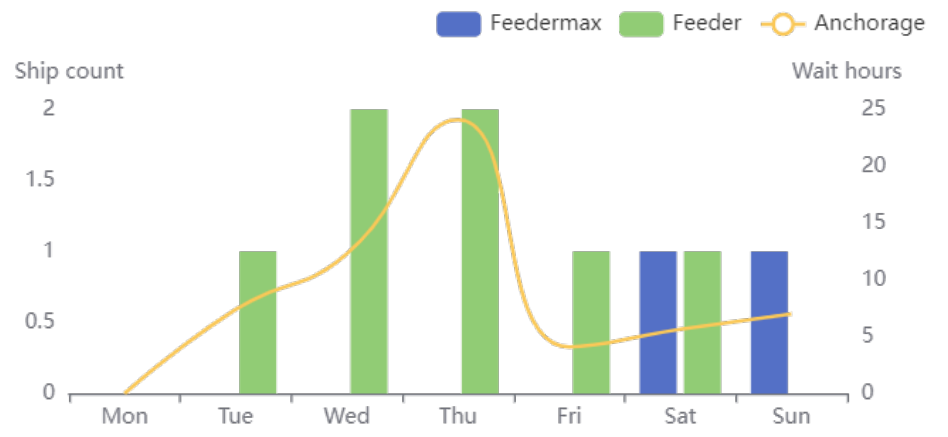
Type	M	T	W	Th	F	Sat	Sun
HDY	4	4	5	4	6	5	5
SMX	5	5	5	4	6	7	9
WT.h.	73.3	97.3	111.3	240.8	157.4	46.3	76



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

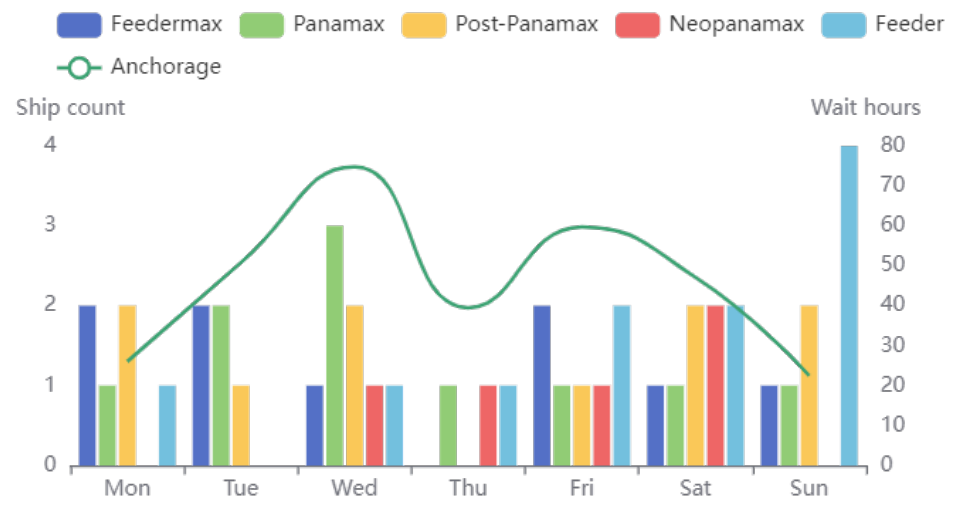
Type	M	T	W	Th	F	Sat	Sun
F.ma.	0	0	0	0	0	1	1
Pan.	0	0	0	0	0	0	0
PPx	0	0	0	0	0	0	0
NPx	0	0	0	0	0	0	0
Fd	0	1	2	2	1	1	0
WT.h.	0.0	7.4	12.3	24.1	4.1	5.65	7
UlcV	0	0	0	0	0	0	0



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

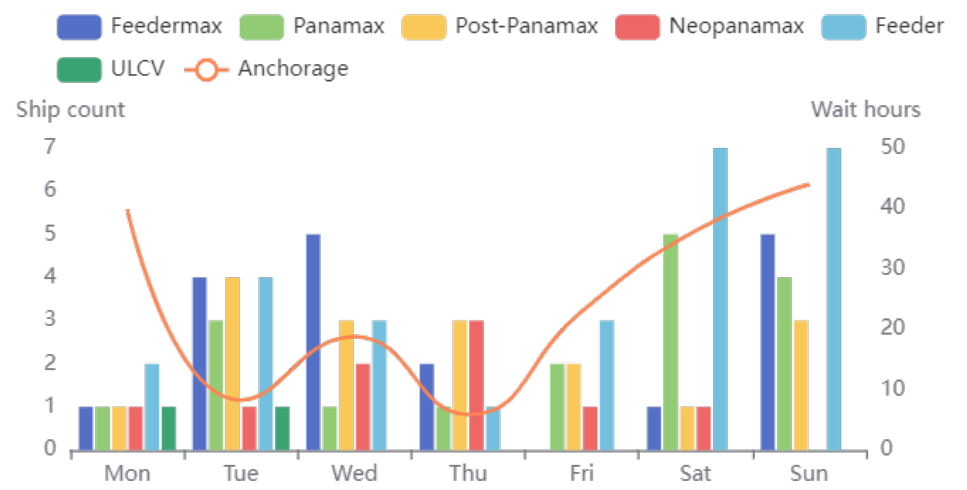
Type	M	T	W	Th	F	Sat	Sun
F.ma.	2	2	1	0	2	1	1
Pan.	1	2	3	1	1	1	1
PPx	2	1	2	0	1	2	2
NPx	0	0	1	1	1	2	0
Fd	1	0	1	1	2	2	4
UlcV	0	0	0	0	0	0	0
WT.h.	26.05	50.8	74.8	39.5	59.7	47.1	22.5



最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

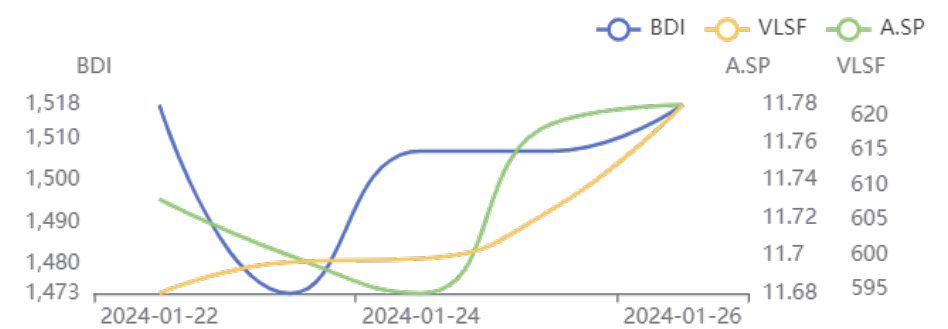
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

Type	M	T	W	Th	F	Sat	Sun
F.ma.	1	4	5	2	0	1	5
Pan.	1	3	1	1	2	5	4
PPx	1	4	3	3	2	1	3
NPx	1	1	2	3	1	1	0
Fd	2	4	3	1	3	7	7
UlcV	1	1	0	0	0	0	0
WT.h.	39.8	8.3	18.8	5.9	23	36.3	44



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

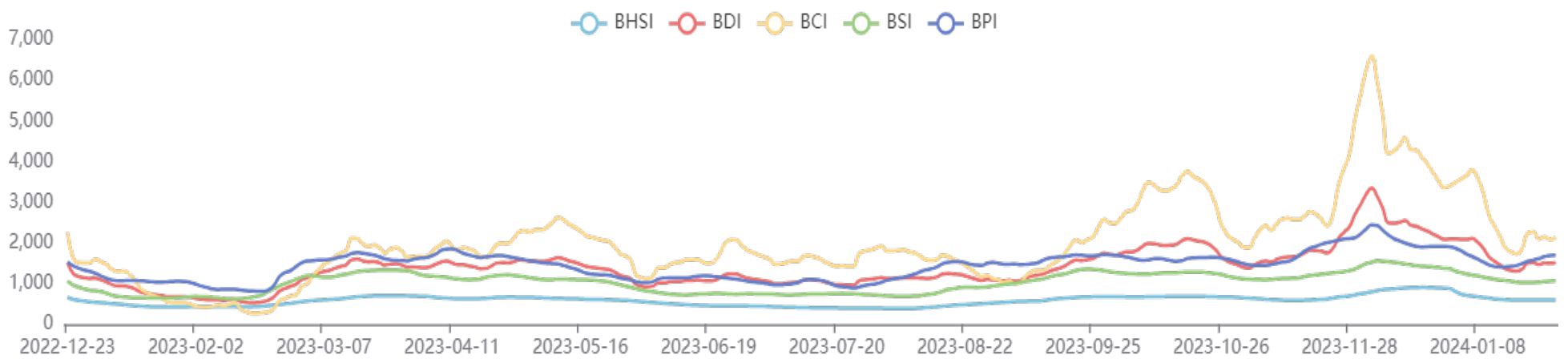
Type	M	T	W	Th	F	Sat	Sun
BDI	1576	1613	1663	1690	1696		
VLSF	594.50	599.00	599.50	606.50	621.50		
A.SP	11.73	11.7	11.68	11.77	11.78	11.88	



第三部分 航运市场 SHIPPING MARKET

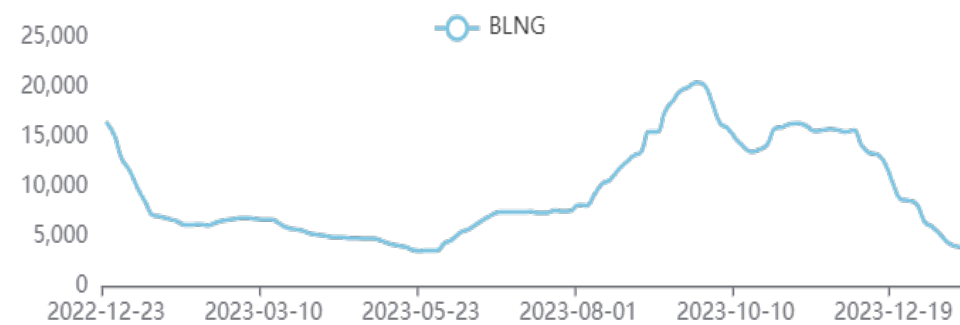
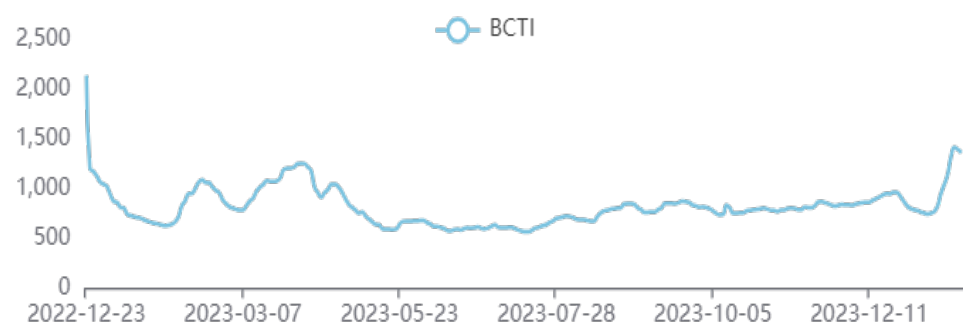
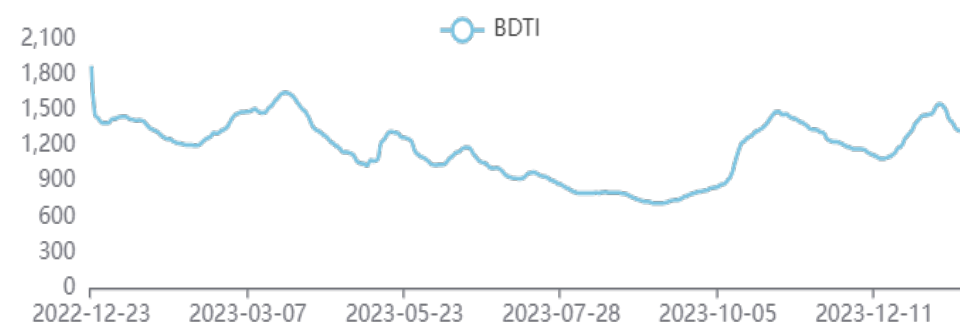
波罗的海干散货指数Baltic Dry Index

Type	PI	WoW	W%	M%	y%
BDI	1518	15.0	1.0	N/A	124.22
BCI	2135	-109.0	-4.86	N/A	288.89
BPI	1696	146.0	9.42	N/A	62.3
BSI	1065	35.0	3.4	N/A	65.12
BHSI	596	2.0	0.34	N/A	37.96

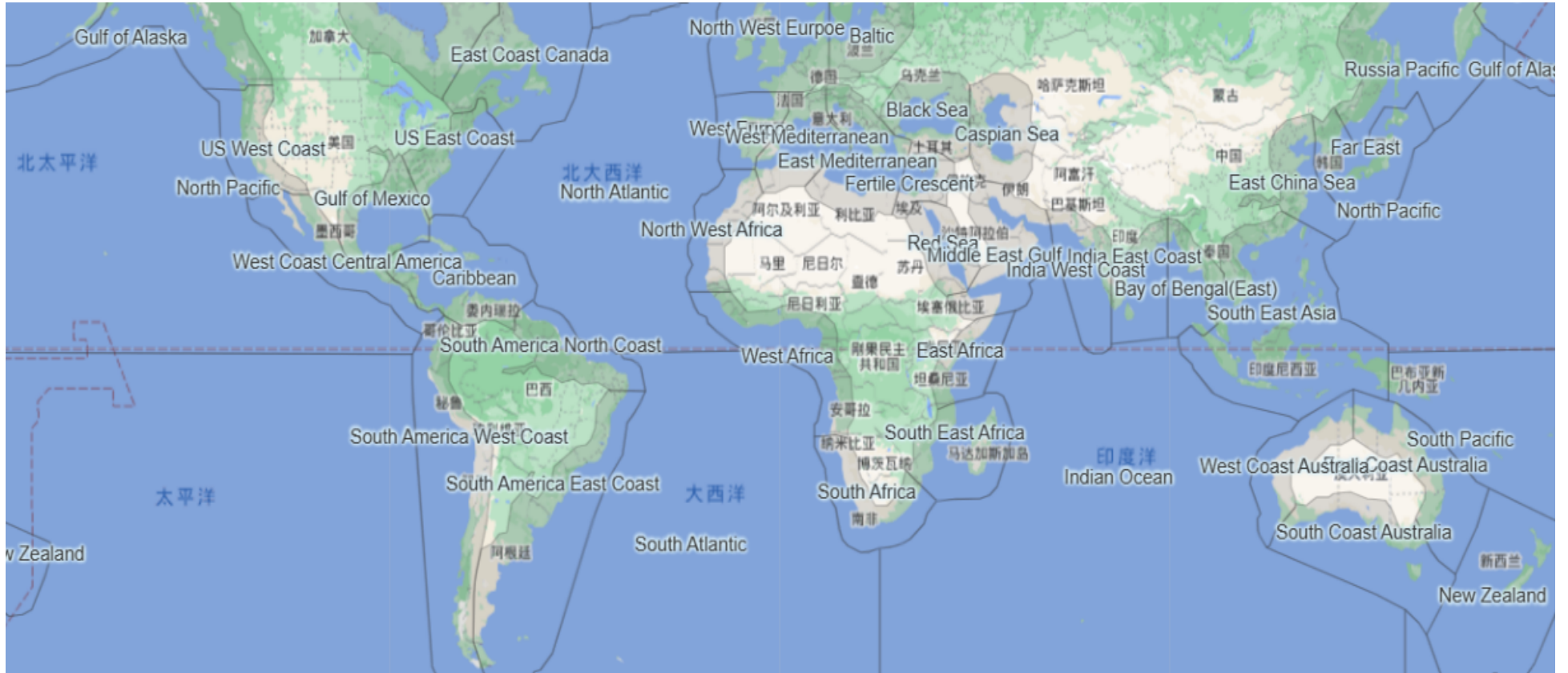


能源运价指数Energy Shipping Index

Type	PI	WoW	W%	M%	y%
BDTI	1347	-76.0	-5.34	N/A	0.82
BCTI	1358	319.0	30.7	N/A	102.99
BLNG	3863	-462.0	-10.68	N/A	-42.47
BLPG	3175	-699.0	-18.04	N/A	-46.95



第四部分 运力分布 SUPPLY DISTRIBUTION

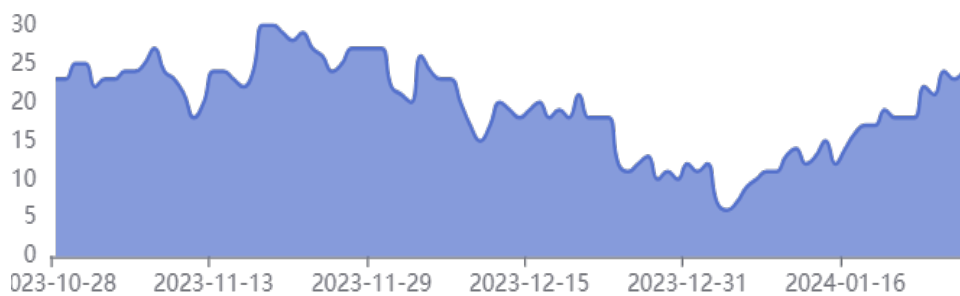


好望角型散货船 Capesize

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.

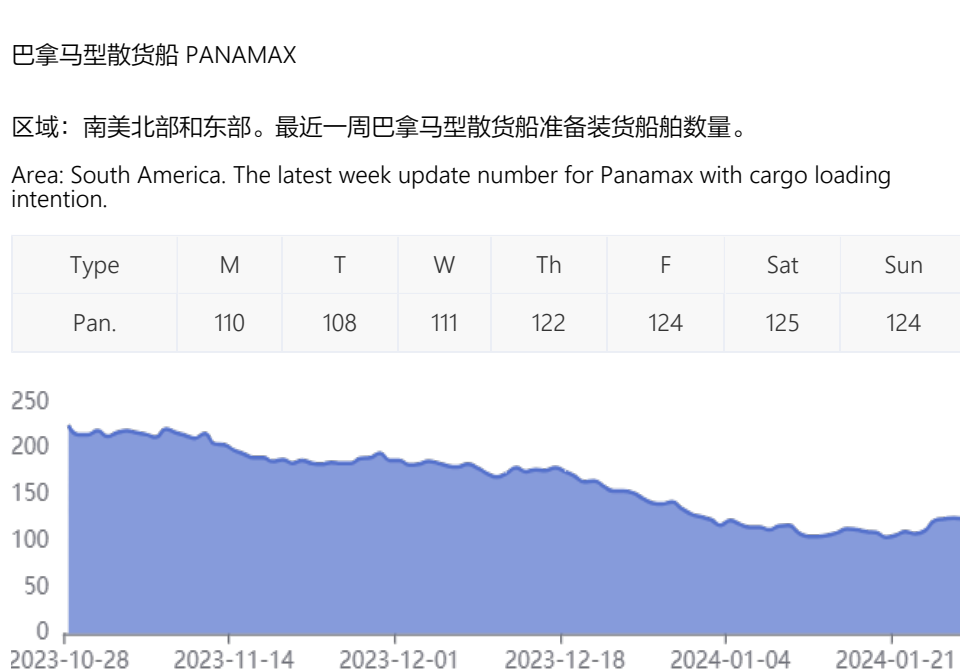
Type	M	T	W	Th	F	Sat	Sun
Cape	18	18	22	21	24	23	24



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	18	12	13	17	20	21	21

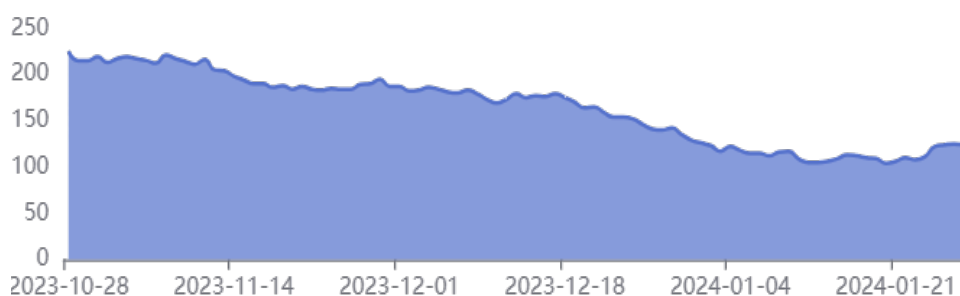


巴拿马型散货船 PANAMAX

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.

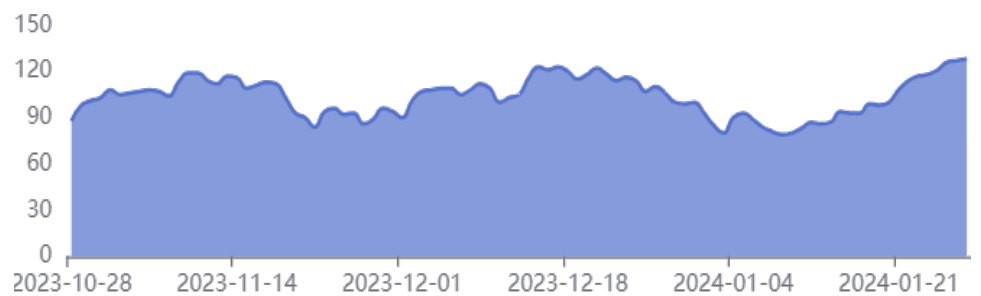
Type	M	T	W	Th	F	Sat	Sun
Pan.	110	108	111	122	124	125	124



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.

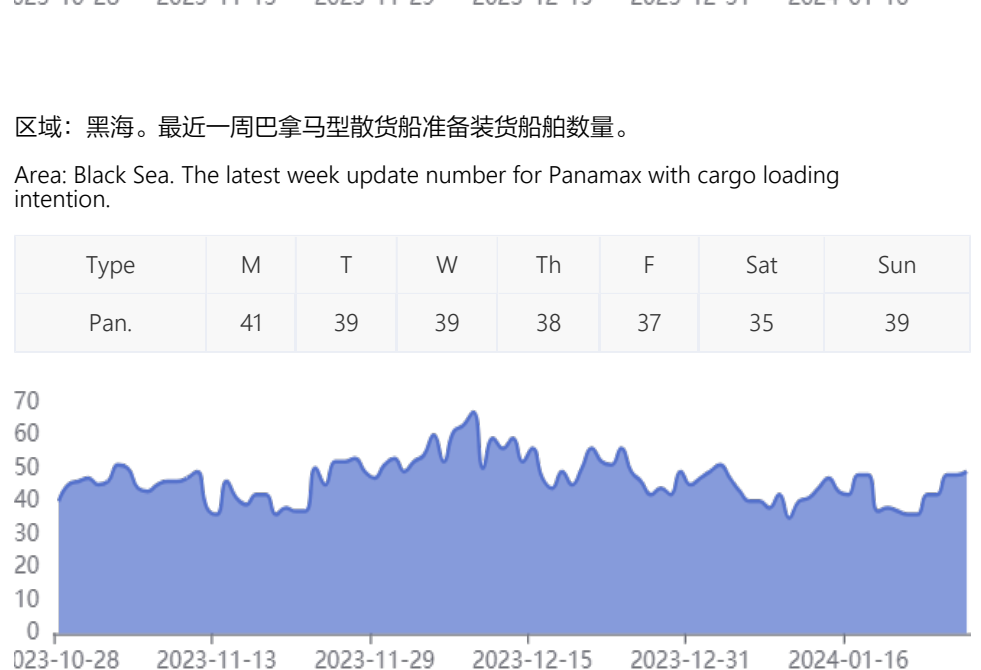
Type	M	T	W	Th	F	Sat	Sun
Cape	114	117	118	121	126	127	128



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.

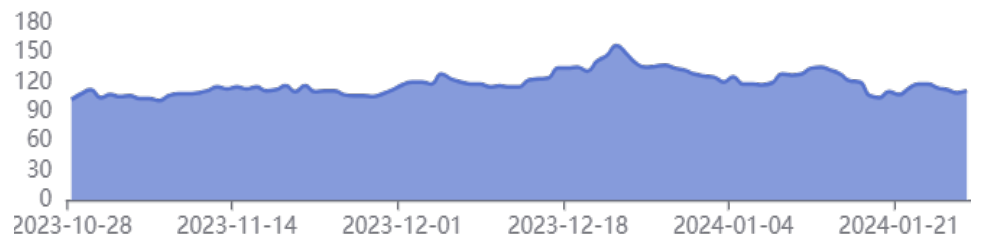
Type	M	T	W	Th	F	Sat	Sun
Pan.	41	39	39	38	37	35	39



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.	113	118	118	114	112	109	111

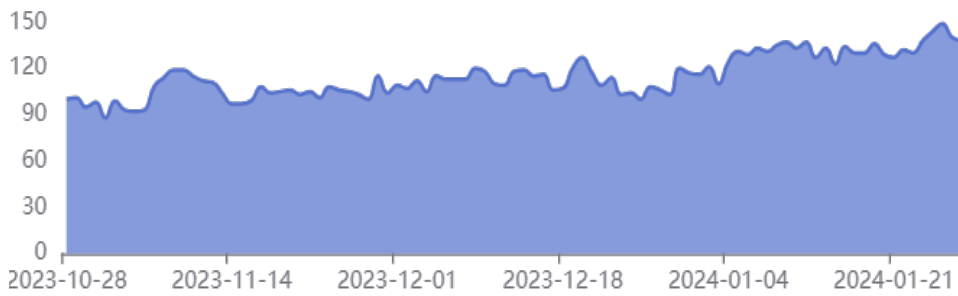


超大灵便型散货 SUPRAMAX

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.

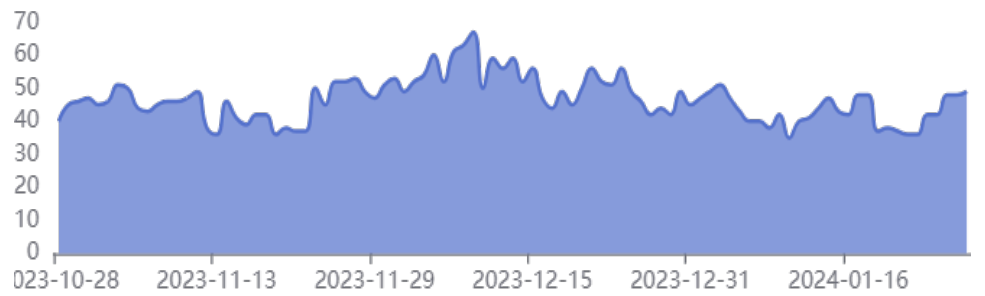
Type	M	T	W	Th	F	Sat	Sun
SMX	132	130	138	144	149	140	138



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.

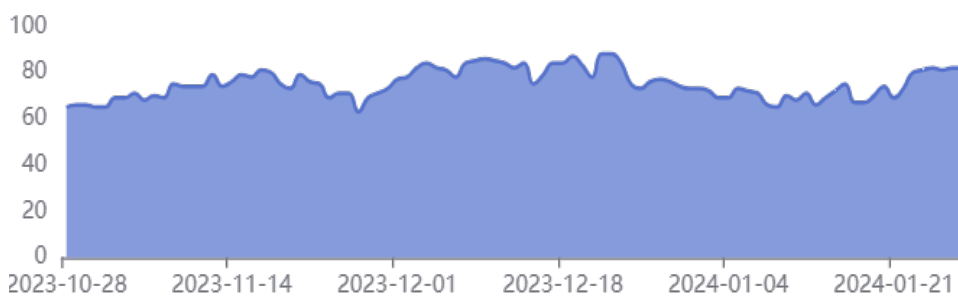
Type	M	T	W	Th	F	Sat	Sun
SMX	36	36	42	42	48	48	49



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.

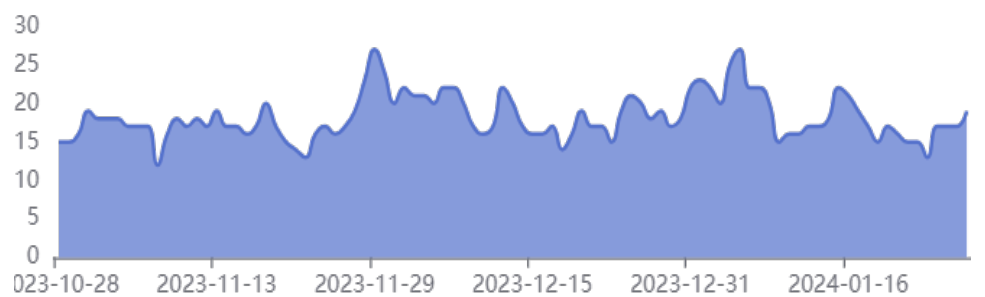
Type	M	T	W	Th	F	Sat	Sun
SMX	15	15	13	17	17	17	19



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.

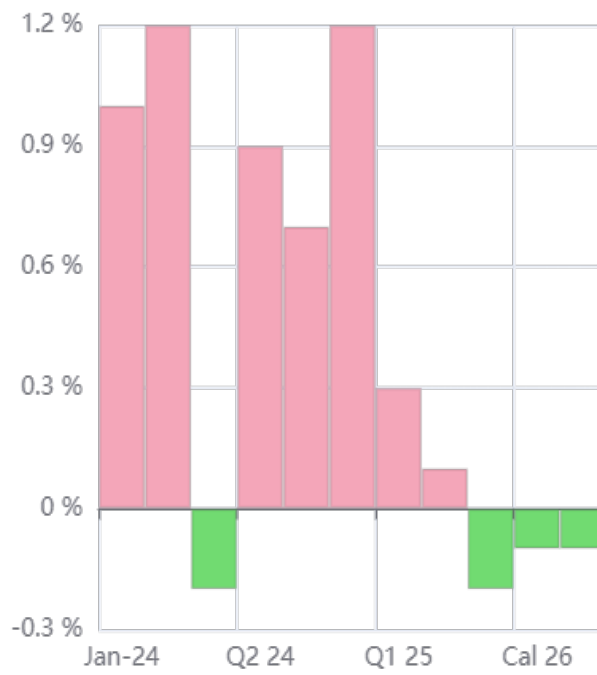
Type	M	T	W	Th	F	Sat	Sun
SMX	73	80	81	82	81	82	82



第五部分 远期运价协议 FFA

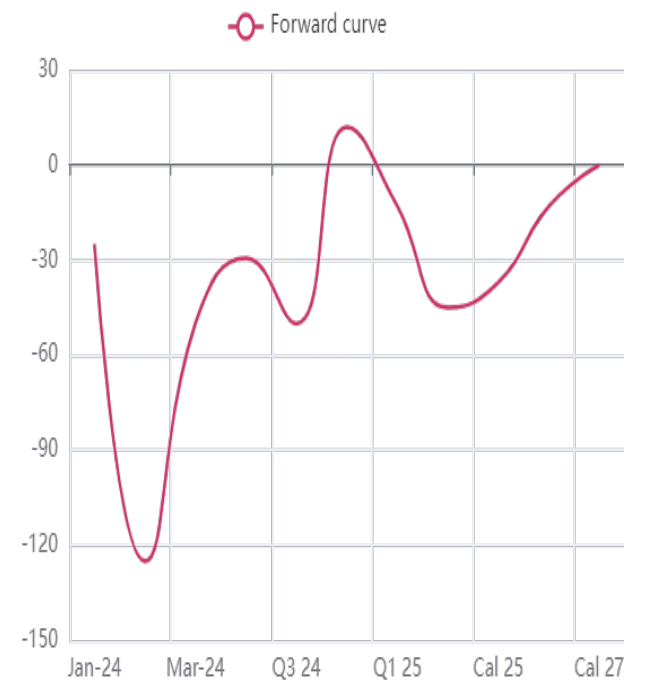
好望角型散货船Capesize

5TC	\$/day	WoW	
Jan-24	20,786.00	197.0	1.0 %
Feb-24	13,886.00	168.0	1.2 %
Mar-24	16,964.00	-40.0	-0.2 %
Q2 24	19,739.33	170.33	0.9 %
Q3 24	21,139.00	153.0	0.7 %
Q4 24	21,725.00	268.0	1.2 %
Q1 25	13,486.00	36.0	0.3 %
Q2 25	17,143.00	22.0	0.1 %
Cal 25	17,721.00	-33.0	-0.2 %
Cal 26	17,618.00	-11.0	-0.1 %
Cal 27	17,532.00	-18.0	-0.1 %



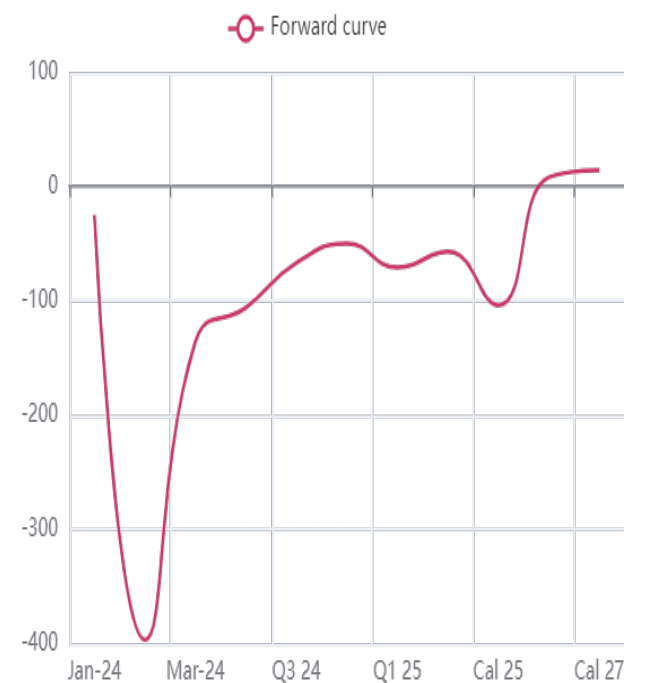
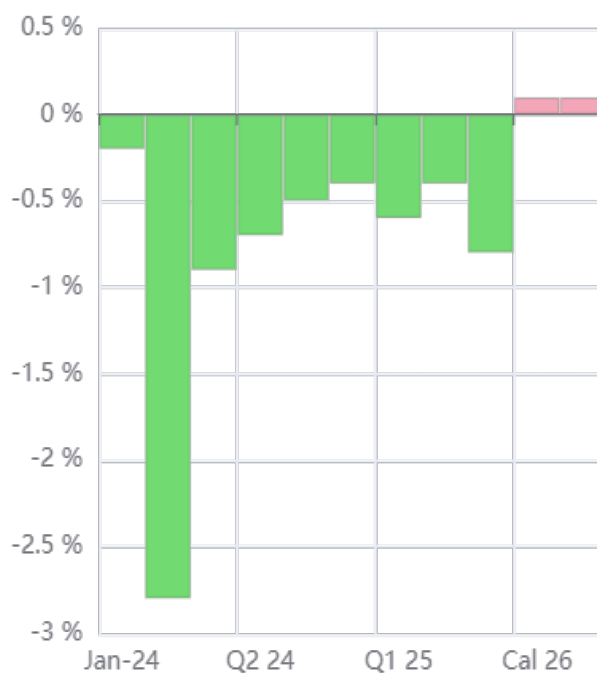
灵便型散货船Handysize

7TC	\$/day	WoW	
Jan-24	11,500.00	-25.0	-0.2 %
Feb-24	11,913.00	-125.0	-1.0 %
Mar-24	14,075.00	-50.0	-0.4 %
Q2 24	14,058.33	-29.33	-0.2 %
Q3 24	13,713.00	-50.0	-0.4 %
Q4 24	13,325.00	12.0	0.1 %
Q1 25	11,800.00	-13.0	-13.0
Q2 25	12,251.00	-45.0	-0.4 %
Cal 25	12,138.25	-37.0	-0.3 %
Cal 26	11,675.00	-13.0	-0.1 %
Cal 27	11,463.00	0.0	0.0 %



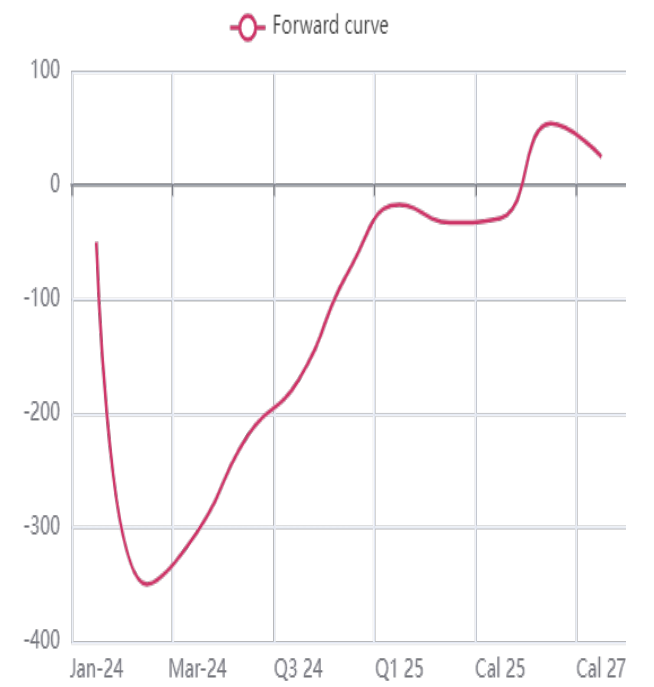
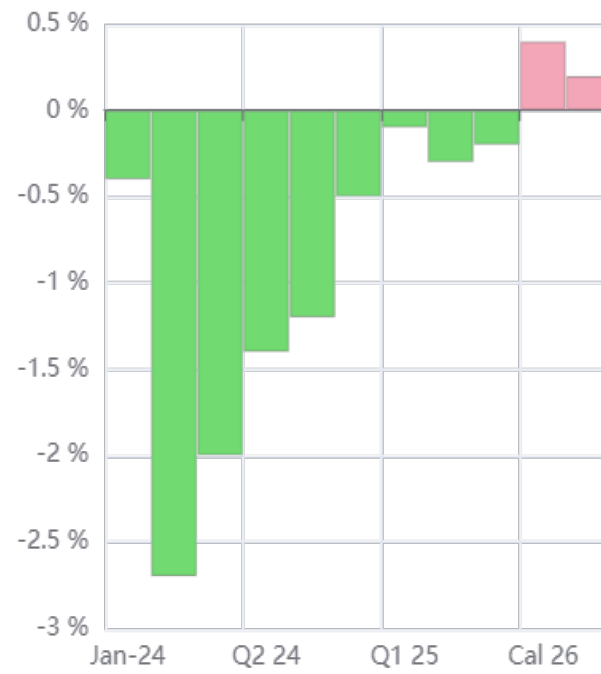
巴拿马型散货船Panamax

4TC	\$/day	WoW	
Jan-24	13,079.00	-25.0	-0.2 %
Feb-24	13,714.00	-397.0	-2.8 %
Mar-24	15,700.00	-136.0	-0.9 %
Q2 24	15,722.67	-106.0	-0.7 %
Q3 24	14,404.00	-67.0	-0.5 %
Q4 24	14,118.00	-50.0	-0.4 %
Q1 25	12,179.00	-71.0	-0.6 %
Q2 25	13,143.00	-57.0	-0.4 %
Cal 25	12,532.00	-104.0	-0.8 %
Cal 26	12,054.00	8.0	0.1 %
Cal 27	11,900.00	14.0	0.1 %



超大灵便型散货船Supramax

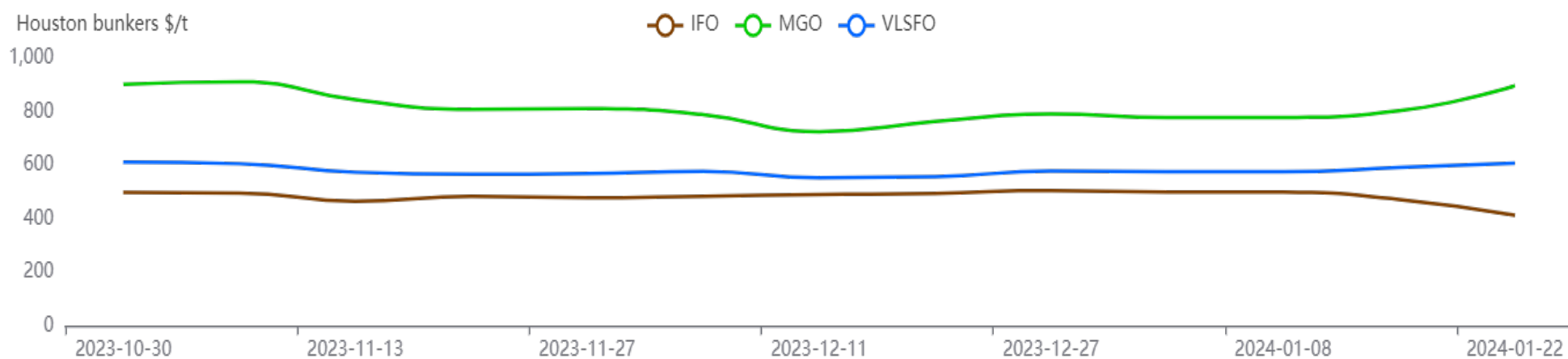
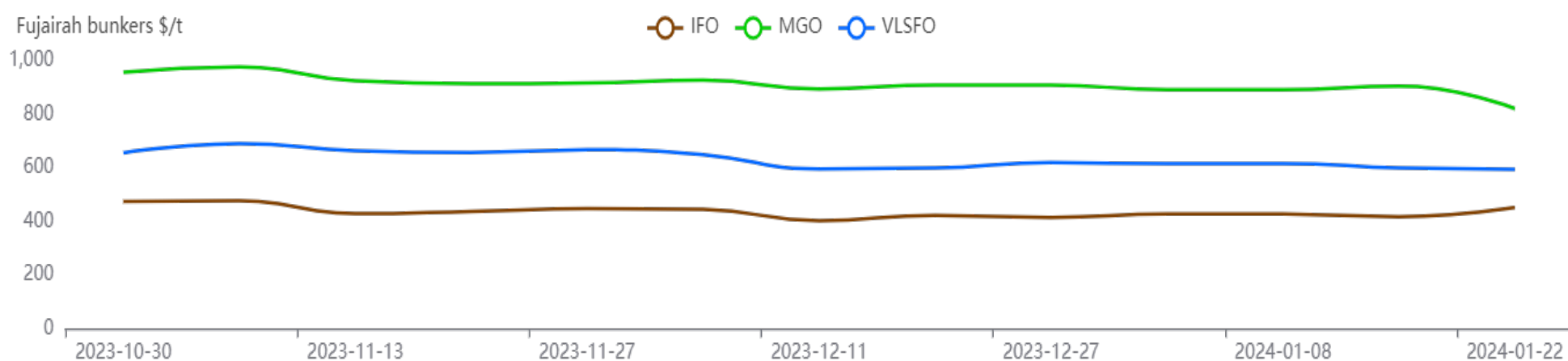
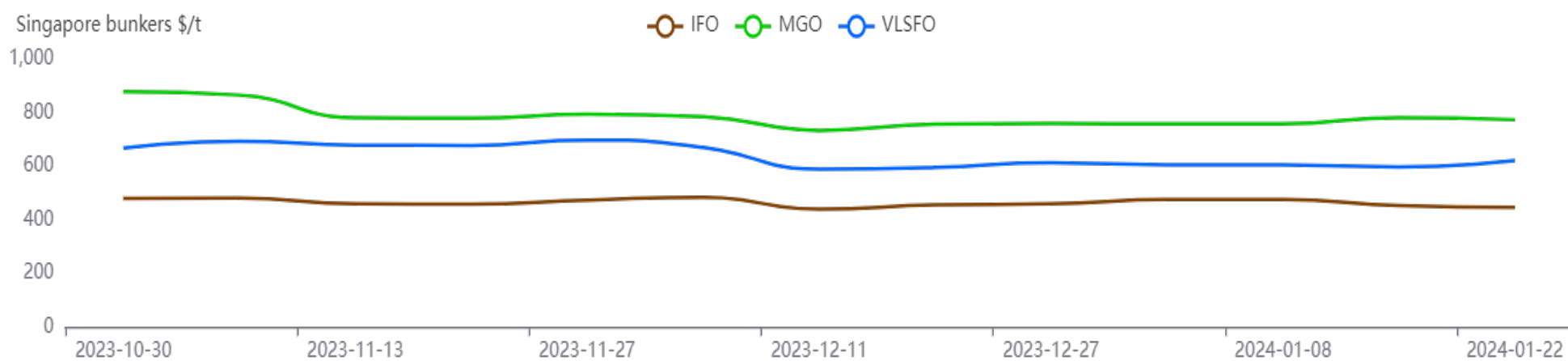
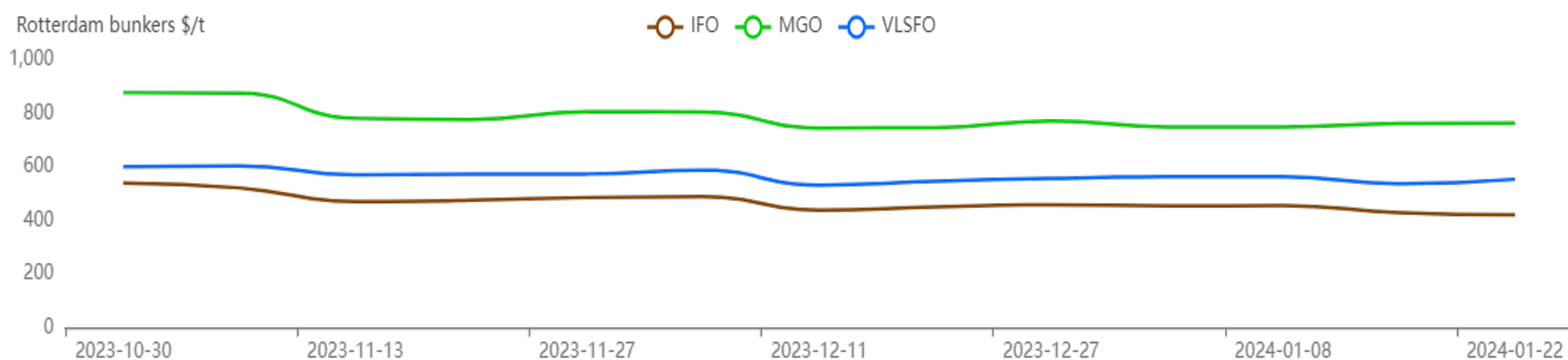
10TC	\$/day	WoW	
Jan-24	12,267.00	-50.0	-0.4 %
Feb-24	12,767.00	-350.0	-2.7 %
Mar-24	15,021.00	-304.0	-2.0 %
Q2 24	14,925.00	-219.33	-1.4 %
Q3 24	14,154.00	-171.0	-1.2 %
Q4 24	13,917.00	-75.0	-0.5 %
Q1 25	12,150.00	-17.0	-0.1 %
Q2 25	12,578.00	-33.0	-0.3 %
12,471.00	Cal 25	-29.0	-0.2 %
Cal 26	12,058.00	54.0	0.4 %
Cal 27	11,883.00	25.0	0.2 %



第六部分 燃油价格 BUNKER PRICE

MP	LO	HO	MO	SP	WoW	W%	M%
zhoushan	630.5	446.5	834.5	184.0	26.0	16.46	-9.36
Singapore	621.0	446.5	774.0	174.5	30.5	21.18	13.31
Rotterdam	554.0	421.0	764.0	133.0	25.0	23.15	35.71
Fujairah	595.0	452.5	821.5	142.5	-39.5	-21.7	-30.32
Houston	608.5	413.0	897.5	195.5	76.5	64.29	167.81

(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		219.0	-1.0	-0.45	-2.67	-21.94
Maize		211.0	199.0	1658.33	-8.66	-32.54
Soybeans		228.0	-4.0	-1.72	-11.28	-26.56
Rice		265.0	1.0	0.38	1.53	32.87
Barley		218.0	-2.0	-0.91	-2.24	-28.11
Energy		Index	+/-	Weekly	Monthly	YTD
Crude Oil	USD/Bbl	73.42	0.99	1.37	-2.21	-7.64
Brent	USD/Bbl	78.75	0.88	1.13	-2.53	-7.13
Natural Gas	USD/MMBtu	2.38	-0.76	-24.2	-5.56	-33.33
Gasoline	USD/Gal	2.17	0.04	1.88	0.46	-13.89
Heating Oil	USD/Gal	1.59	-1.08	-40.45	-40.45	-51.23
Ethanol	USD/Gal	1.58	0.0	0.0	-5.39	-28.51
Naphtha	USD/T	626.83	-2.41	-0.38	-1.5	-8.18
Propane	USD/Gal	0.8	0.02	2.56	19.4	0.0
Uranium	USD/Lbs	106.0	13.5	14.59	16.48	110.53
Methanol	CNY/T	2431.0	32.0	1.33	-0.45	-6.75
TTF Gas	EUR/MWh	27.05	-3.23	-10.67	-20.09	-53.51
UK Gas	GBP/thm	66.47	-8.66	-11.53	-26.71	-54.47
Industrial		Index	+/-	Weekly	Monthly	YTD
Copper	USD/Lbs	3.77	0.02	0.53	-3.33	-9.38
Coal	USD/T	128.0	-2.85	-2.18	-12.03	-65.41
Steel	CNY/T	3876.0	77.0	2.03	-2.02	-4.18
Iron Ore	USD/T	132.5	-0.5	-0.38	-7.02	4.33
Aluminum	USD/T	2169.5	-38.5	-1.74	-7.68	-16.4
Iron Ore Fe 62%	USD/T	2169.5	-38.5	-1.74	-7.68	-16.4
Metals		Index	+/-	Weekly	Monthly	YTD
Gold	USD/t.oz	2023.5	-32.4	-1.58	-2.12	5.57
Silver	USD/t.oz	22.2	-1.1	-4.72	-7.73	-8.15
Platium	USD/t.oz	894.7	-19.7	-2.15	-7.97	-15.41
Currencies		Index	+/-	Weekly	Monthly	YTD
EUR/USD		1.09	-0.01	-0.91	-1.8	0.93
USD/CNY		7.2	0.01	0.14	0.7	6.82

第八部分 本周话题 WEEKLY TOPIC



2023年可替代燃料新造船和脱碳发展

2023年是航运业脱碳非常重要的一年，碳的零排放承诺在国际海事组织(IMO)也达成了一致。全球船东都纷纷采取了前瞻性的积极响应，2023年新造船市场的新能源船舶比重空前上升，具备可替代能源的新造船项目接近一半订单水平。

航运从现阶段到未来过渡到脱碳是挑战也是机遇。我们除了看到航运界对甲醇双燃料动力发动机的兴趣，也看到了氨双燃料主机的登场，有的船东也将目光放在综合多种减排措施上。比如德国船东Gersides Green已获在荷兰Damen订购的两艘普通货船将安装电池和风力作为动力。法国船东路易达孚将为空中客车货运合同建造三艘以风力作为辅助的双燃料的现代化、低排放的滚装船，这些船只将在中国建造。到目前甲醇双燃料主机的集装箱船获得的新造船订单最多。

我们处在一个重要的、前所未有的船队更新的征途中，2023年期间约550个可替代燃料的新造船订单，按载重吨计算约占所有订单的39%。2023年替代燃料订单中最大的份额还是来自液化天然气双燃料，这种替代燃料还是属于过渡燃料；2023年甲醇双燃料船的订单超过130艘；还有几十艘新造船订单涉及液化石油气作为燃料；同时出现几艘氨燃料的新造船订单；这些都反映了脱碳的多种选择。航运不同板块对于替代燃料的选择也具有一定特色，集装箱船新造船订单替代燃料准备就绪的比例持续上升超过90%；接近80%的汽车船几乎都具有替代燃料的功能；散货船和油轮新造船订单的可替代燃料的比例要低不少；当前全球船队的7%是具备使用替代燃料能力(高于

2017年的2.5%)。

船舶脱碳技术还有其它重要的发展，创新节能技术在船舶的使用持续扩大，当前船队中大概有7200多艘船舶应用了相应的脱碳技术，其中超过45艘船舶采用风力推进或协助推进，有超过30艘船舶正在尝试碳捕获技术。

船舶脱硫塔的安装也在逐年增加，船队中总数超过4700艘船舶安装了脱硫塔，占全球船队载重吨的24.6%，其中2023年期间超过450艘船舶加装了脱硫塔。2019年船舶加装脱硫塔开始快速加速。

随着全球寻求缓和气候变化的解决方案的压力越来越大，绿色转型将给航运、贸易、海上和能源带来根本性的变化。船队在线hiFleet将致力于提供数据和情报，帮助整个行业的利益相关者制定关键决策，以促进绿色转型。无论从陆地还是到海洋，我们正在见证宏大的脱碳时代，船东和租家都在积极的应对，或者被时代所淘汰，或者成为时代的领航者，航运的新时代需要全新的思维和营运方式。

2023 is a very important year for the decarbonization for shipping industry, and the carbon zero emission commitment has also been agreed at the International Maritime Organization (IMO). Global shipowners have adopted a proactive response, and the proportion of new energy vessels in the new shipbuilding market in 2023 has increased on history record, and new shipbuilding projects with alternative energy sources are close to half the order level.

The transition to decarbonization of shipping from the present to the future is both a challenge and an opportunity. In addition to seeing the shipping industry's interest in methanol dual-fuel power engines, we have also seen the debut of ammonia dual-fuel main engines, and some shipowners are also focusing on a comprehensive variety of emission reduction measures. German shippers Gersides Green, for example, have ordered two general cargo ships in Damen, the Netherlands, to be powered by batteries and wind power. French shipowner Louis Dreyfus will build three modern, low-emission, wind-assisted dual-fuel ro-ro vessels for the Airbus Cargo contract, which will be built in China. By far the largest number of new shipbuilding orders have been received by container ships with methanol dual fuel mainframes.

We are in the midst of an important and unprecedented fleet renewal, with approximately 550 new shipbuilding orders for alternative fuels during 2023, representing approximately 39% of all orders by deadweight ton. The largest share of 2023 alternative fuel orders will come from LNG dual fuel, which is still a transition fuel. Orders for more than 130 methanol dual-fuel vessels in 2023; There are also dozens of new shipbuilding orders involving liquefied petroleum gas as fuel; At the same time, there are several new shipbuilding orders for ammonia fuel; These reflect the many options for decarbonization. The selection of alternative fuels in different shipping sectors also has certain characteristics, and the proportion of replacement fuel readiness of new shipbuilding orders for container ships continues to rise by more than 90%. Nearly 80% of cars and boats have alternative fuel functions. The proportion of alternative fuels in new shipbuilding orders for bulk carriers and tankers is much lower; Seven percent of the global fleet is now capable of using alternative fuels (up from 2.5 percent in 2017).

In other important developments, the use of innovative energy saving technologies in ships continues to expand, with more than 7,200 ships in the current fleet fitted with decarbonization technologies, more than 45 of which are wind-powered or assisted, and more than 30 ships experimenting with carbon capture technologies.

The installation of desulfurization towers on ships is also increasing year by year, with a total of more than 4,700 ships in the fleet having installed desulfurization towers, accounting for 24.6% of the global fleet deadweight tons, with more than 450 ships having installed desulfurization towers during 2023. In 2019, the installation of desulfurization towers on ships began to accelerate rapidly.

As global pressure mounts to find solutions to mitigate climate change, the green transition will bring fundamental changes to shipping, trade, maritime and energy. HiFleet will aim to provide data and intelligence to help stakeholders across the industry make key decisions to facilitate the green transition. Whether on land or at sea, we are witnessing a grand era of decarbonization, and shipowners and charterers are actively responding to it, or being eliminated by The Times, or becoming the leaders of The Times, and the new era of shipping requires a new way of thinking.