



# 2024年 第7周市场周报

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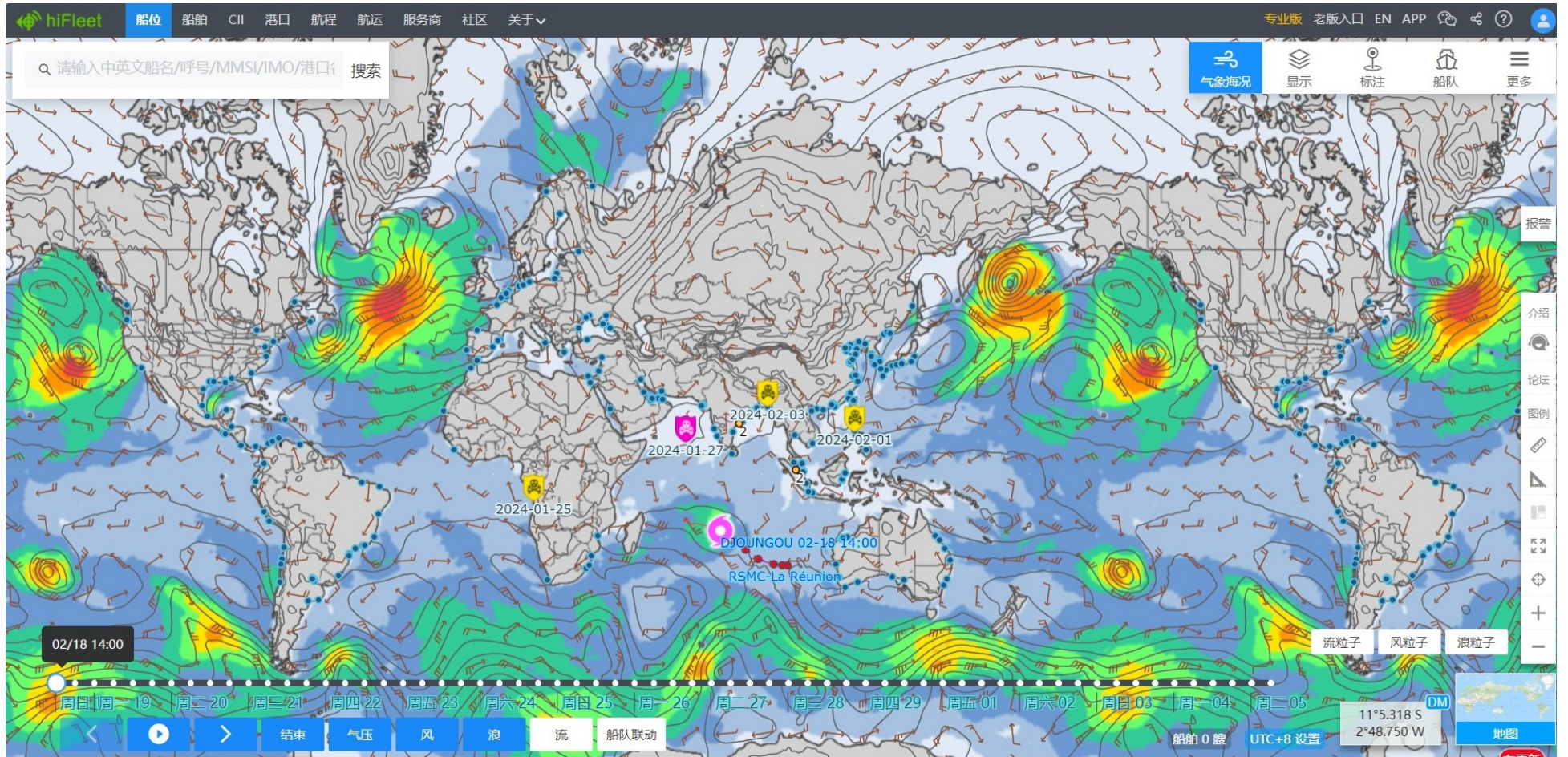
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本周话题 WEEKLY TOPIC

# 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1026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 1026 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.

## 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7-8级，相关海域海浪将从2米的中浪到4米巨浪；台湾海峡风力有5-6级，台湾海峡洋面海浪将经历2米中浪，南海大部海域风力维持在4-5级，有2米中浪，渤海湾部分地区有轻雾。辽东湾最大浮冰范围30海里；黄海北部最大浮冰范围10海里。大西洋和太平洋北部区域低压活动开始减弱，海域海况逐步改善。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 gale with the seas from moderate to rough. The wind in the Taiwan Strait is breeze. The sea in the Taiwan Strait happens to experience moderate. In most of the South China Sea the wind is moderate with moderate sea and some areas in Bohai Sea may see light fog. Low-pressure in the north of North Atlantic Ocean and Pacific are becoming strong again, sea conditions become rough.

## 海盗事件 Piracy

最近一周没有最新的海盗报告事件。There is no new piracy report for the latest week.

## 海上事件 Marine Incidents

2月16日，也门胡塞叛军在红海又袭击了一艘商船。据报道，胡塞武装的导弹击中了一艘10万载重吨的成产品油'POLLUX'(2003年建造)。胡塞武装发射了四枚反舰弹道导弹，其中至少三枚是针对"POLLUX"轮。On February 16, Yemen's Houthi rebels attacked another merchant ship in the Red Sea. It is reported that a Houthi missile hit a 100,000 DWT production oil 'POLLUX' (built in 2003) ". The Houthis fired four anti-ship ballistic missiles, at least three of which were aimed at the POLLUX.

## 其它 Others

无。Nil.

## 备注 Remark

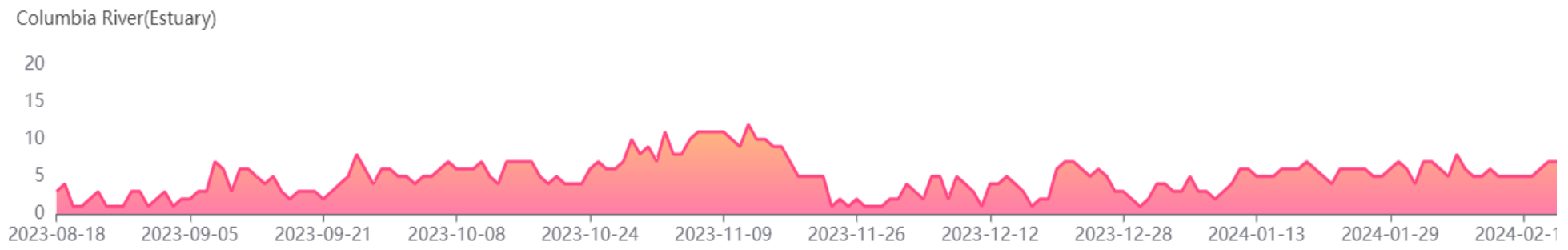
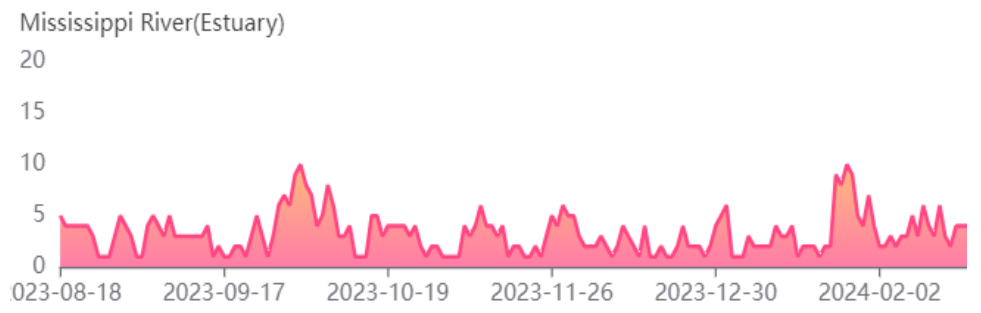
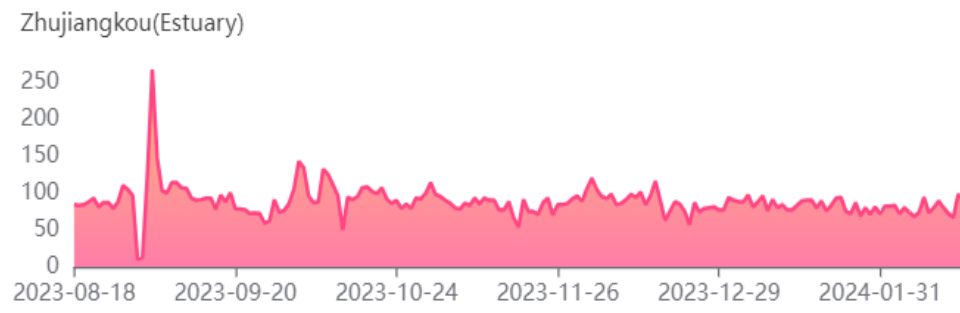
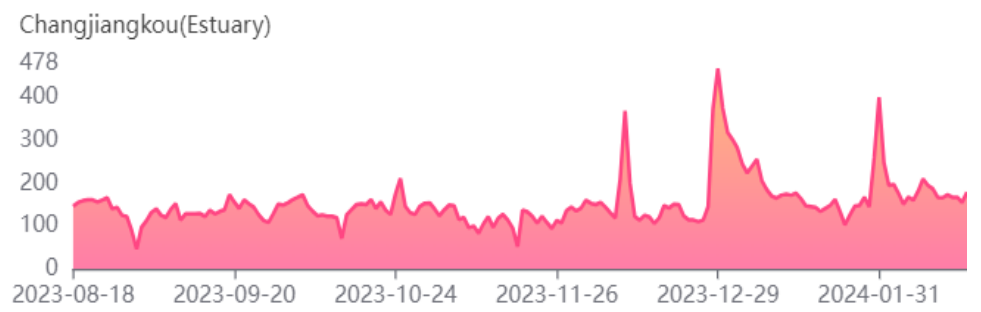
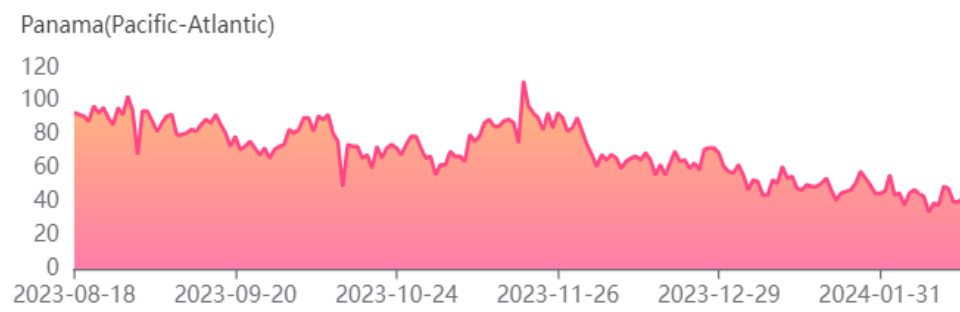
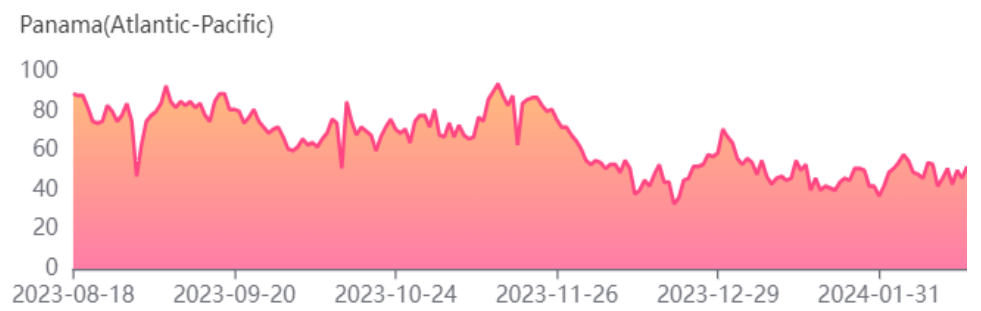
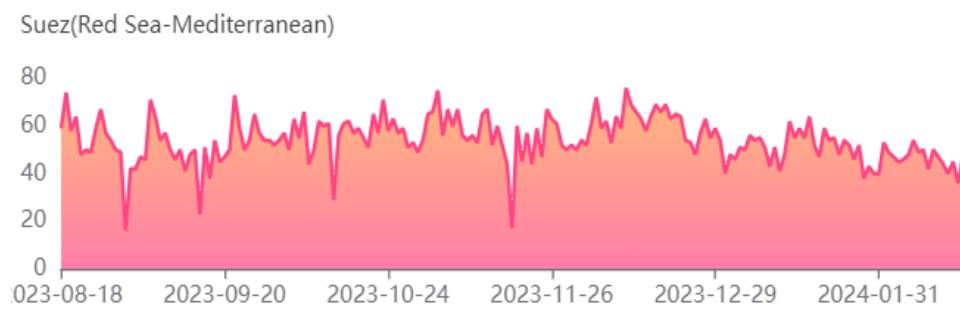
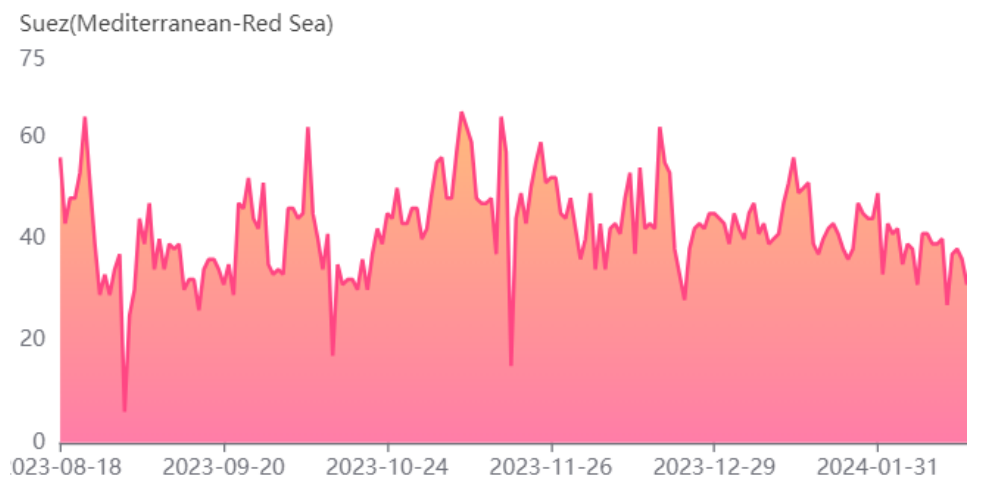
本报告数据截止时间为2024年2月18日北京时间17点；所有数据和或观点仅供参考，在任何情况下本公司及其员工不承担任何风险。The data deadline for this report is Beijing time 17 hours on Feb 18 of 2024; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

## 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	47	1361	-28	-169
Miss.Riv.	4	122	1	67
CJK	179	5180	-67	-830
Pa.Atlan.	52	1378	-34	-118
Colum.Riv.	7	166	-1	42
Suez.Med.	31	1138	-19	-128
Pa.Pac.	45	1313	5	-296
ZJK	73	2310	36	-132

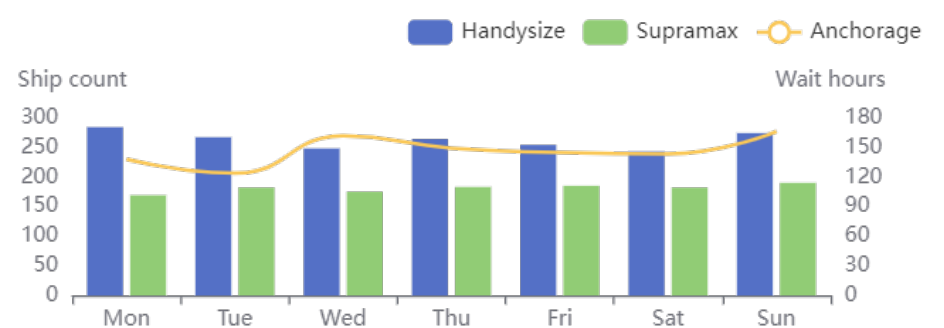


(P.N.-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

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

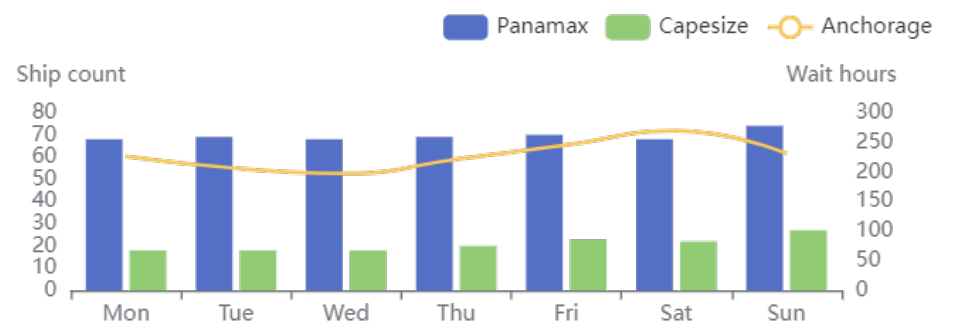
Type	M	T	W	Th	F	Sat	Sun
HDY	284	267	248	264	254	243	274
SMX	169	182	175	183	185	182	190
WT.h.	138	123.7	161.6	149.2	144.8	143.3	166



## 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

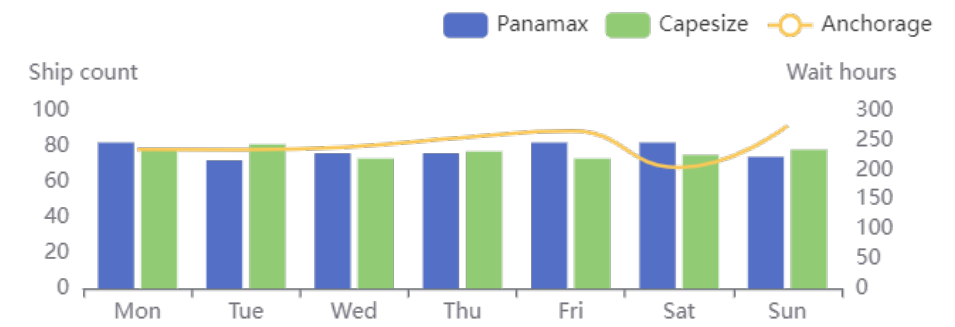
Type	M	T	W	Th	F	Sat	Sun
Pan.	68	69	68	69	70	68	74
Cap	18	18	18	20	23	22	27
WT.h.	226.1	206.1	197.3	221.3	245.3	269.3	231



## 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

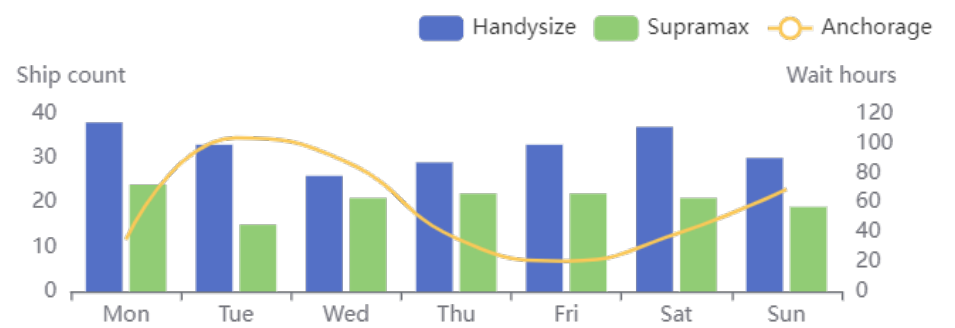
Type	M	T	W	Th	F	Sat	Sun
Pan.	82	72	76	76	82	82	74
Cap	78	81	73	77	73	75	78
WT.h.	234.5	233.9	239.4	254.4	266.1	204	274.5



## 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 &amp; Handy Num. and Waiting Time Information in Anchorages of Black Sea

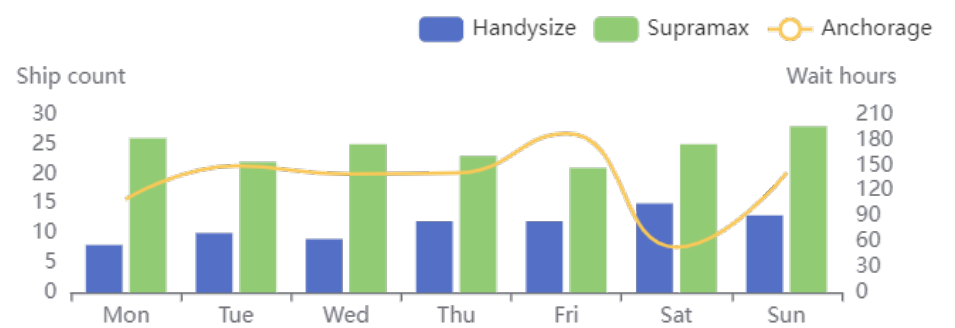
Type	M	T	W	Th	F	Sat	Sun
HDY	38	33	26	29	33	37	30
SMX	24	15	21	22	22	21	19
WT.h.	34.95	103.6	87.5	35.9	20.5	38.9	69



## 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

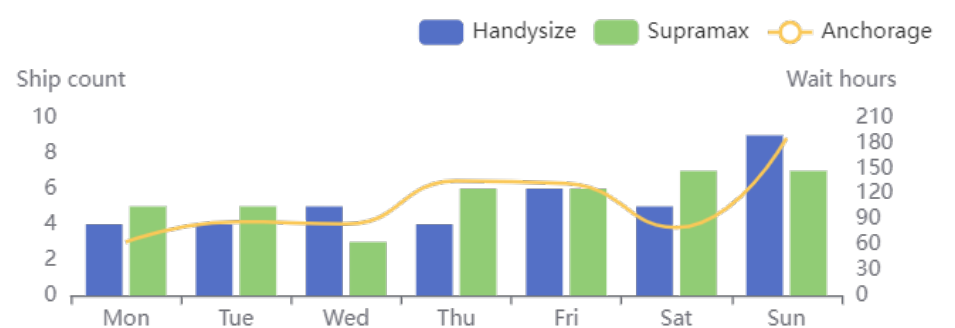
Type	M	T	W	Th	F	Sat	Sun
HDY	8	10	9	12	12	15	13
SMX	26	22	25	23	21	25	28
WT.h.	110.2	149.4	139.8	141	187.8	53.5	141



## 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

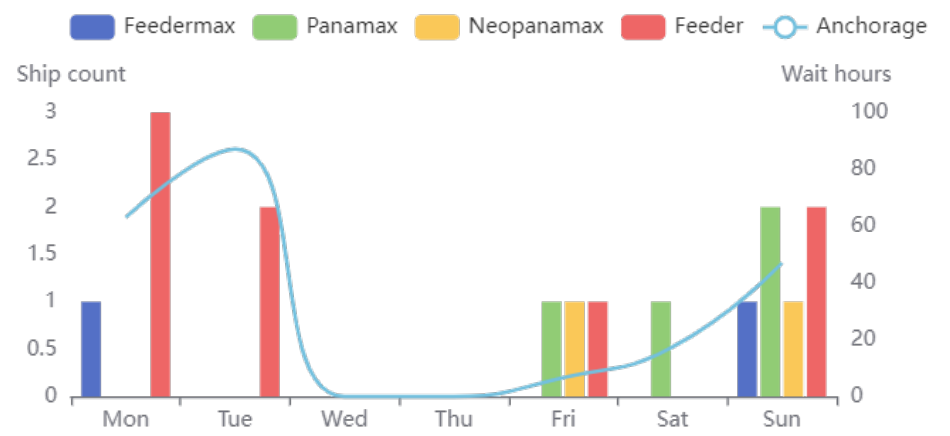
Type	M	T	W	Th	F	Sat	Sun
HDY	4	4	5	4	6	5	9
SMX	5	5	3	6	6	7	7
WT.h.	63.1	87.1	84.3	135.1	132.3	80.1	186



## 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

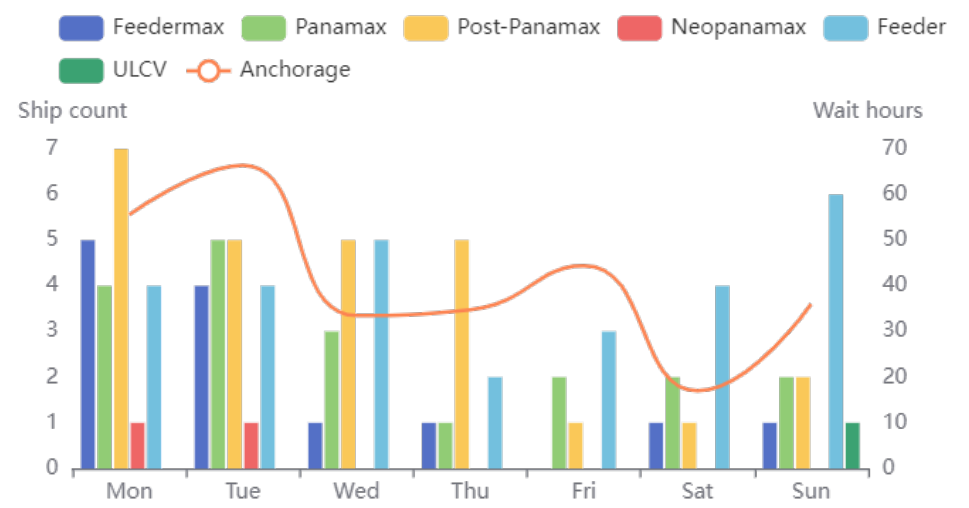
Type	M	T	W	Th	F	Sat	Sun
F.ma.	1	0	0	0	0	0	1
Pan.	0	0	0	0	1	1	2
PPx	0	0	0	0	0	0	0
NPx	0	0	0	0	1	0	1
Fd	3	2	0	0	1	0	2
WT.h.	63.1	87.1	0.0	0.0	6.6	17.4	47
UlcV	0	0	0	0	0	0	0



## 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

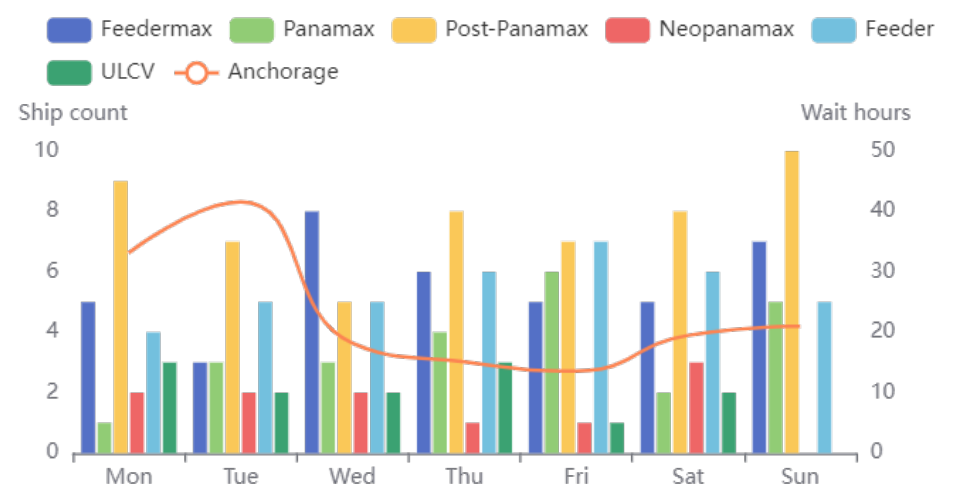
Type	M	T	W	Th	F	Sat	Sun
F.ma.	5	4	1	1	0	1	1
Pan.	4	5	3	1	2	2	2
PPx	7	5	5	5	1	1	2
NPx	1	1	0	0	0	0	0
Fd	4	4	5	2	3	4	6
UlcV	0	0	0	0	0	0	1
WT.h.	55.6	66.4	33.5	34.8	44.45	17	36



## 最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

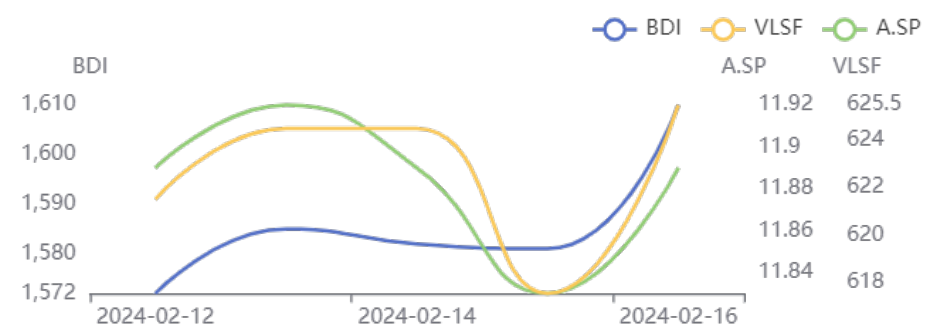
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

Type	M	T	W	Th	F	Sat	Sun
F.ma.	5	3	8	6	5	5	7
Pan.	1	3	3	4	6	2	5
PPx	9	7	5	8	7	8	10
NPx	2	2	2	1	1	3	0
Fd	4	5	5	6	7	6	5
UlcV	3	2	2	3	1	2	0
WT.h.	33.2	41.6	18.2	15.1	13.6	19.5	21



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

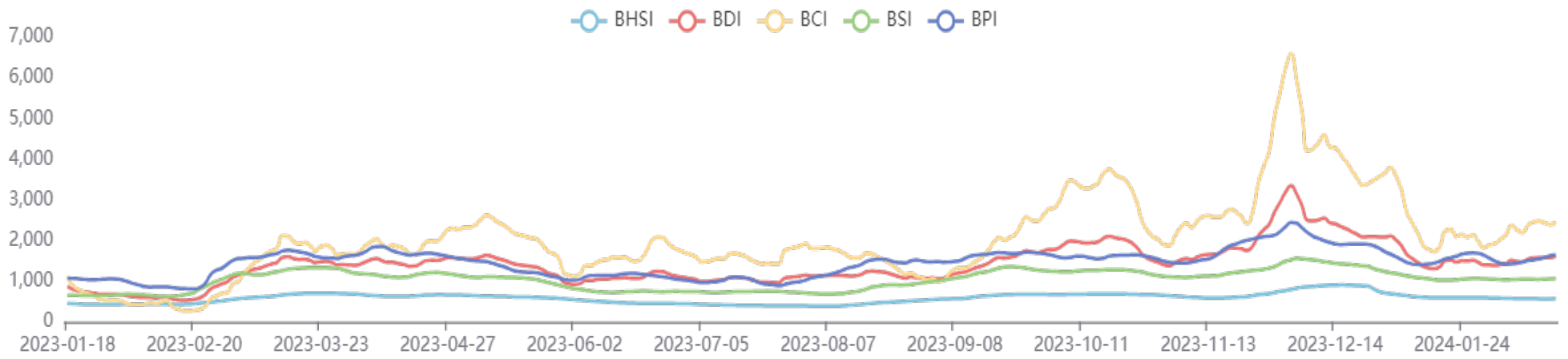
Type	M	T	W	Th	F	Sat	Sun
BDI	1526	1550	1582	1623	1646		
VLSF	621.50	624.50	624.50	617.50	625.50		
A.SP	11.89	11.92	11.89	11.83	11.89	11.82	



# 第三部分 航运市场 SHIPPING MARKET

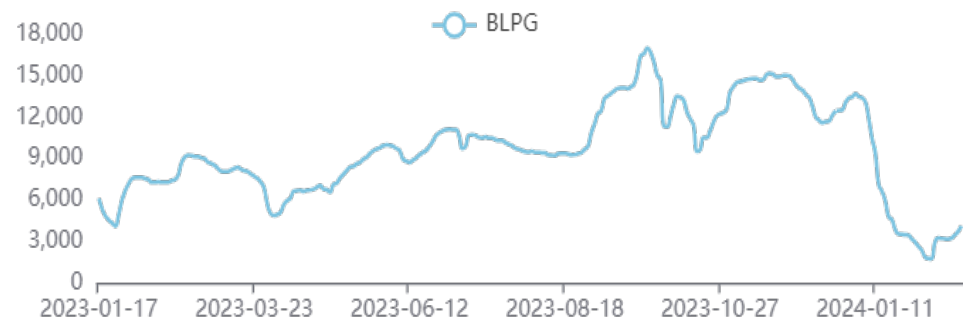
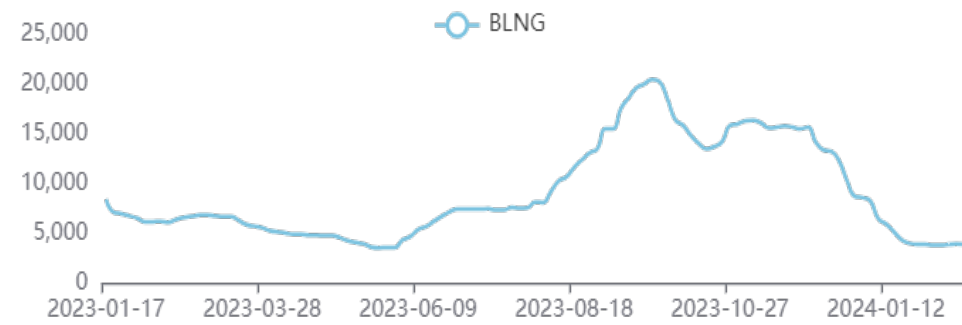
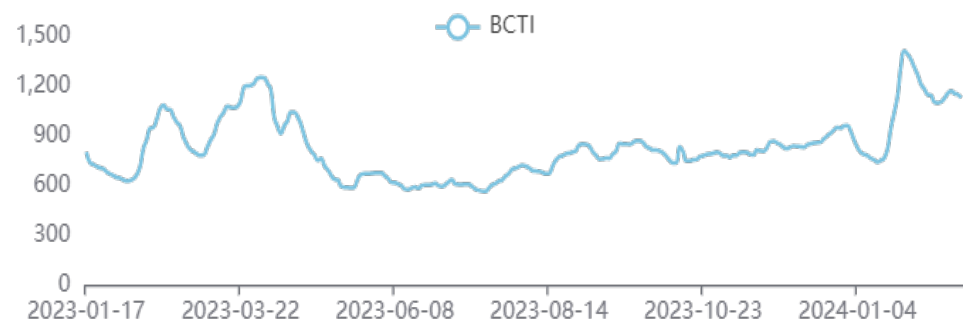
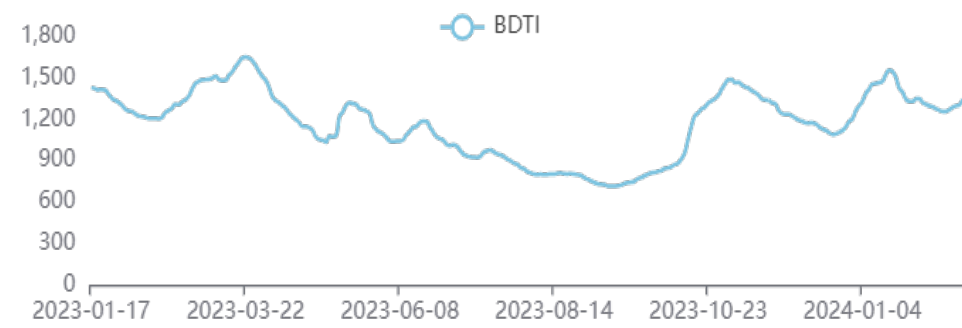
波罗的海干散货指数Baltic Dry Index

Type	PI	WoW	W%	M%	y%
BDI	1610	65.0	4.21	7.12	203.77
BCI	2448	67.0	2.81	9.09	790.18
BPI	1646	137.0	9.08	6.19	101.22
BSI	1071	18.0	1.71	3.98	62.27
BHSI	572	4.0	0.7	-3.7	31.8

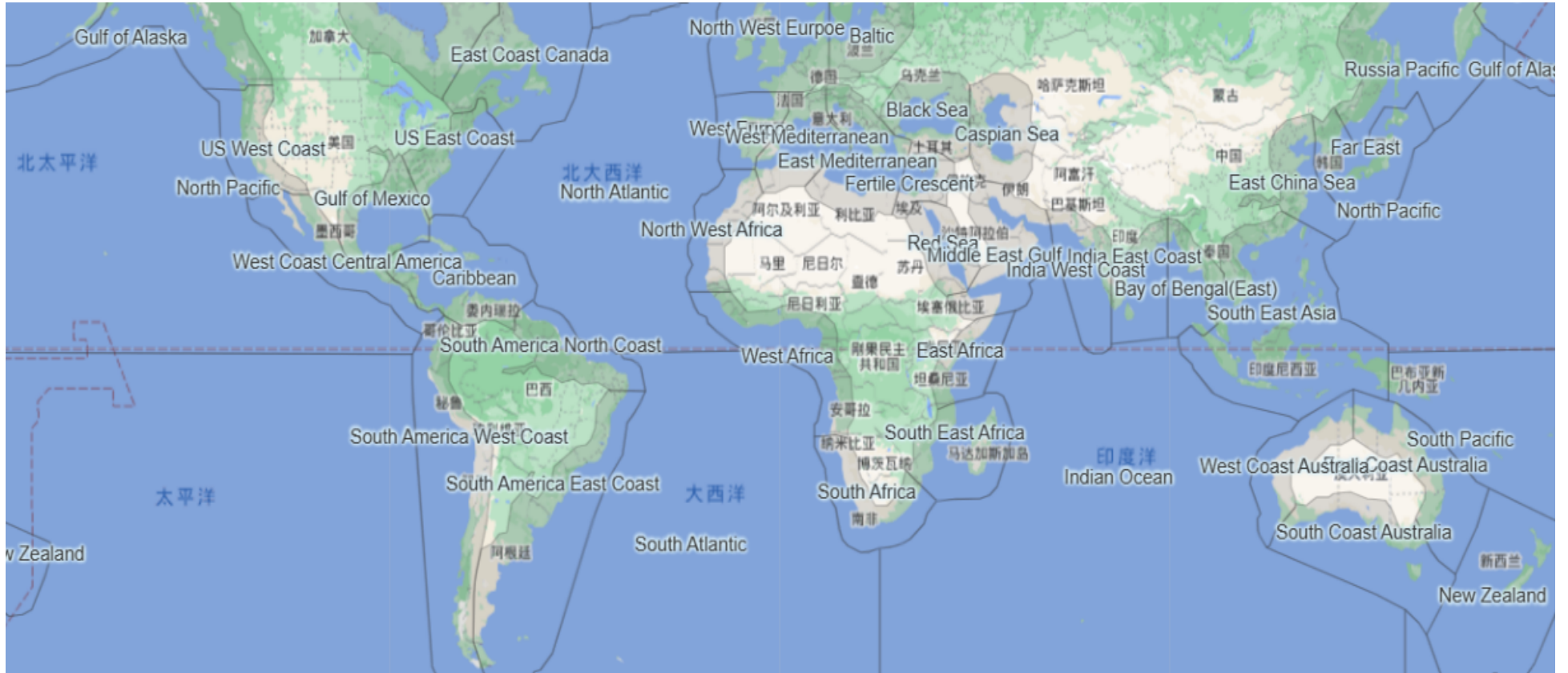


能源运价指数Energy Shipping Index

Type	PI	WoW	W%	M%	y%
BDTI	1341	73.0	5.76	-5.76	7.8
BCTI	1129	3.0	0.27	8.66	6.21
BLNG	3872	17.0	0.44	-10.47	-39.31
BLPG	4125	941.0	29.55	6.48	-44.23



# 第四部分 运力分布 SUPPLY DISTRIBUTION

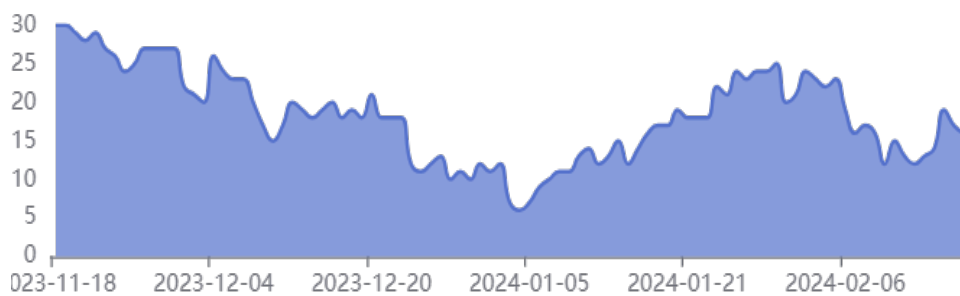


## 好望角型散货船 Capesize

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.

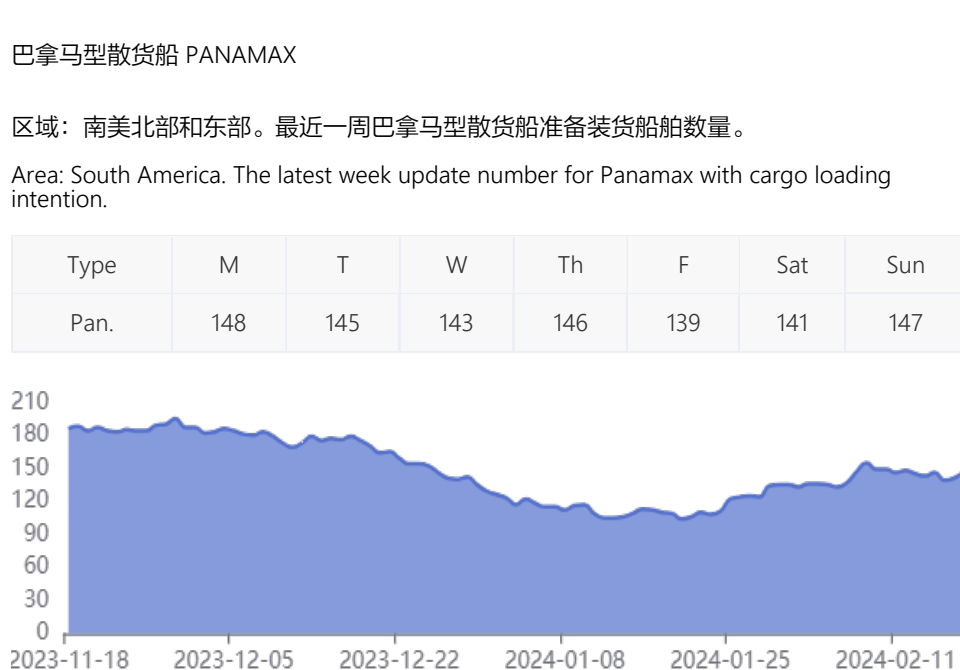
Type	M	T	W	Th	F	Sat	Sun
Cape	13	12	13	14	19	17	16



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.

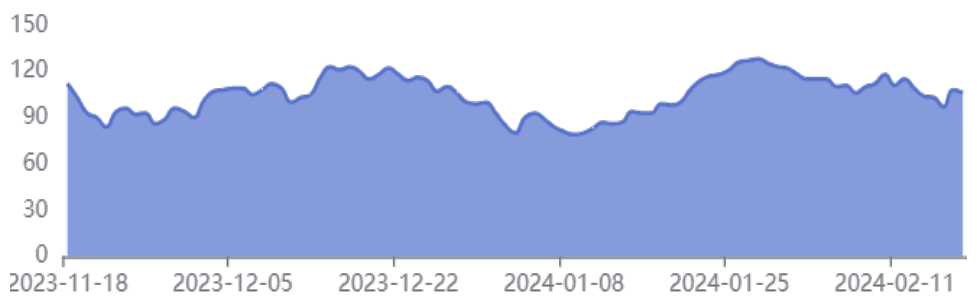
Type	M	T	W	Th	F	Sat	Sun
Cape	35	37	33	29	25	25	25



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	115	109	104	103	97	108	106

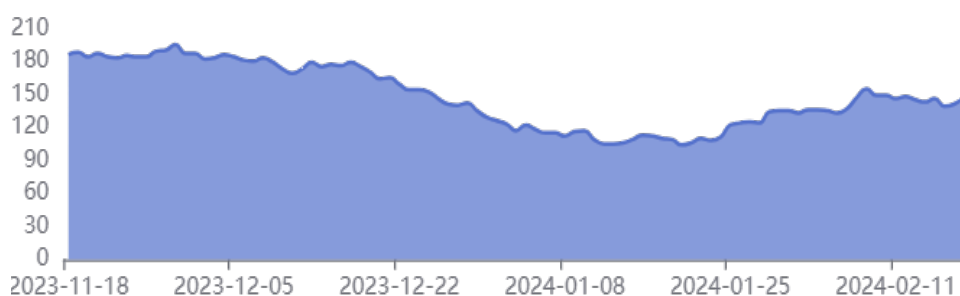


## 巴拿马型散货船 PANAMAX

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.

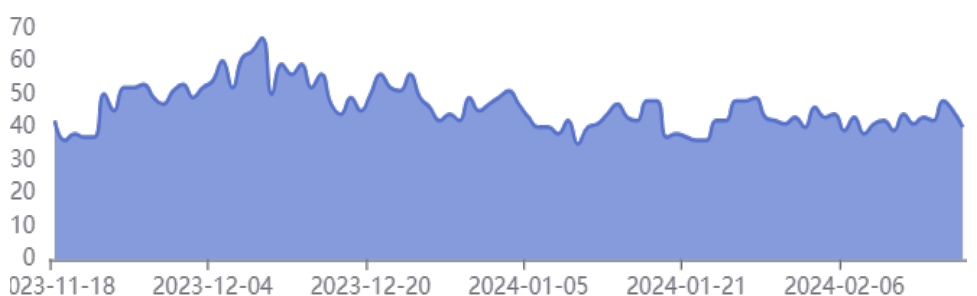
Type	M	T	W	Th	F	Sat	Sun
Pan.	148	145	143	146	139	141	147



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.

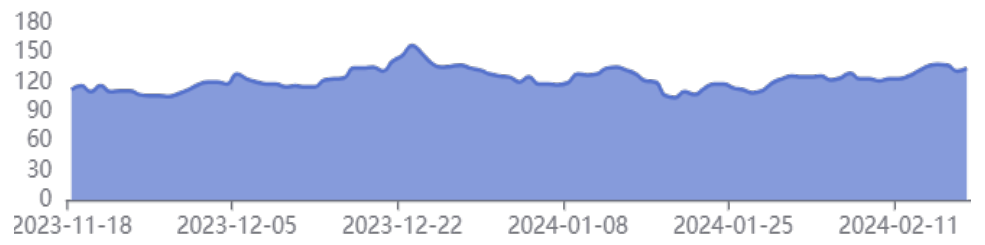
Type	M	T	W	Th	F	Sat	Sun
Pan.	49	52	45	43	53	47	48



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	131	136	138	137	131	134

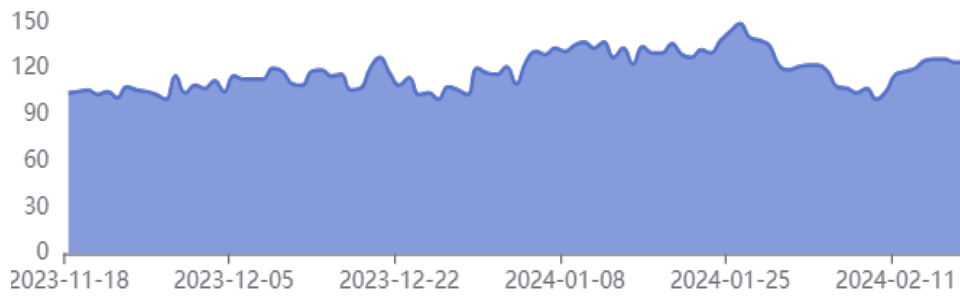


#### 超大灵便型散货 SUPRAMAX

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.

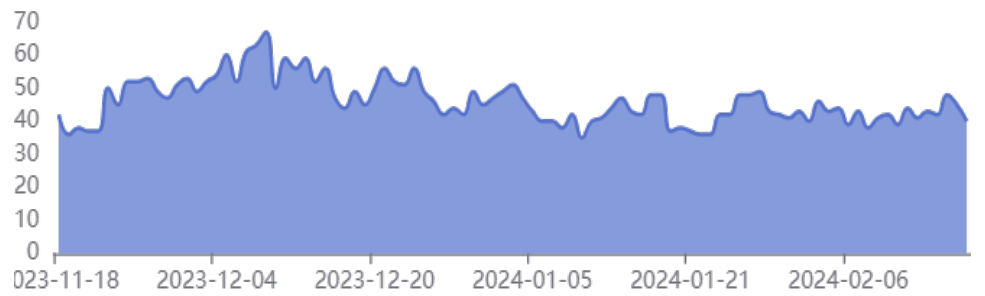
Type	M	T	W	Th	F	Sat	Sun
SMX	118	120	125	126	126	124	124



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.

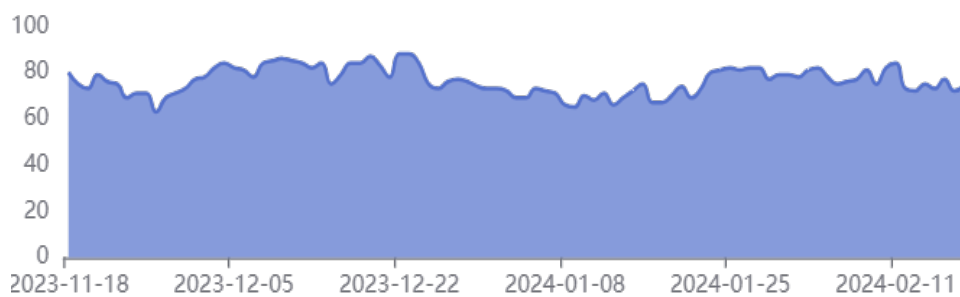
Type	M	T	W	Th	F	Sat	Sun
SMX	44	41	43	42	48	45	40



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.

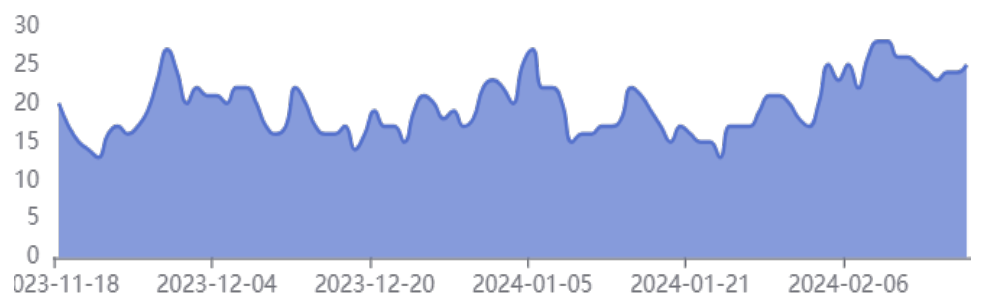
Type	M	T	W	Th	F	Sat	Sun
SMX	26	25	24	23	24	24	25



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	75	73	77	72	74

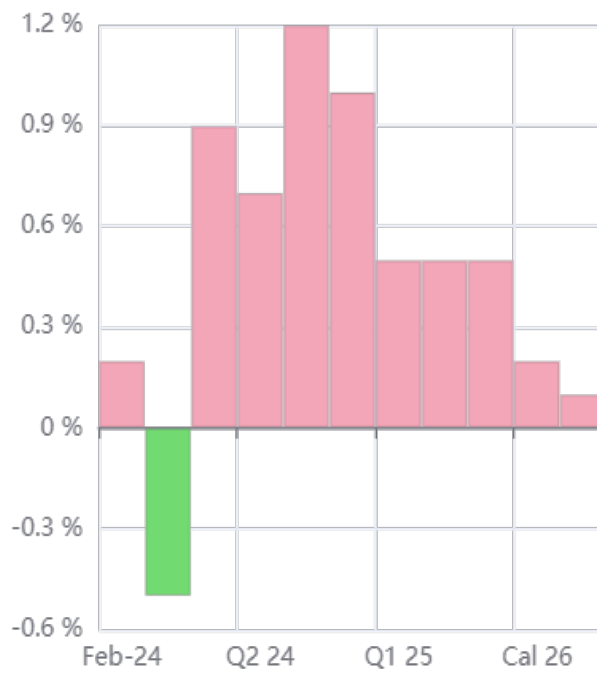




# 第五部分 远期运价协议 FFA

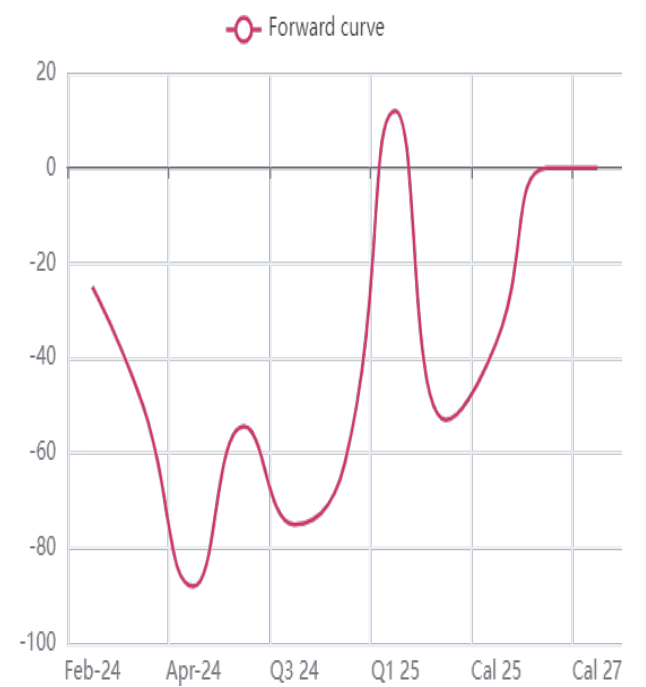
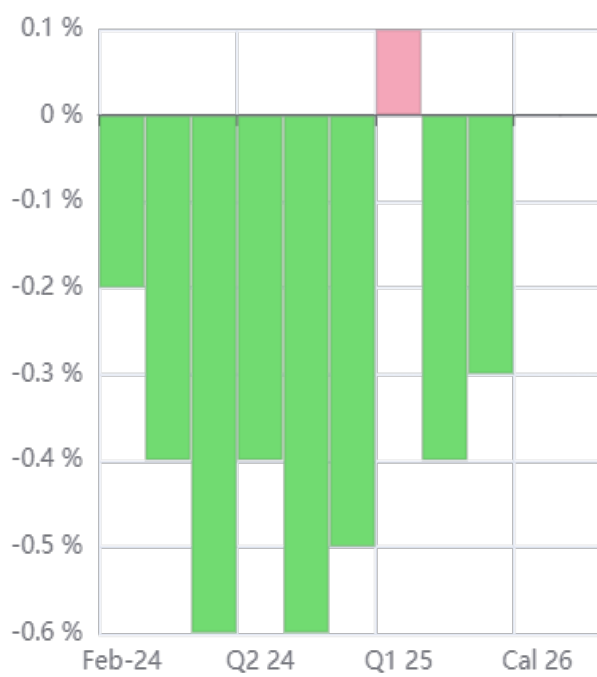
## 好望角型散货船Capesize

5TC	\$/day	WoW	
Feb-24	19,196.00	42.0	0.2 %
Mar-24	21,600.00	-104.0	-0.5 %
Apr-24	24,521.00	225.0	0.9 %
Q2 24	24,610.33	159.33	0.7 %
Q3 24	24,861.00	293.33	1.2 %
Q4 24	25,045.00	256.0	1.0 %
Q1 25	15,354.00	83.0	0.5 %
Q2 25	19,093.00	86.0	0.5 %
Cal 25	19,996.00	100.0	0.5 %
Cal 26	19,232.00	39.0	0.2 %
Cal 27	18,543.00	14.0	0.1 %



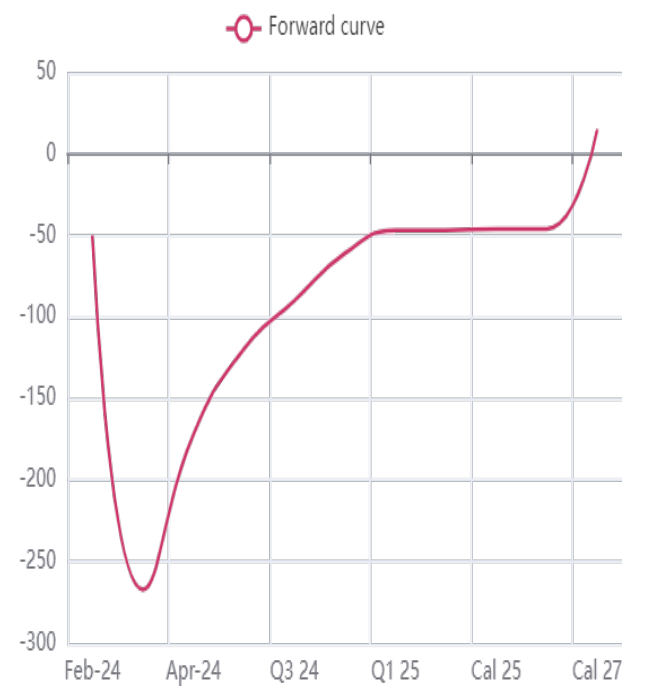
## 灵便型散货船Handysize

7TC	\$/day	WoW	
Feb-24	10,800.00	-25.0	-0.2 %
Mar-24	13,463.00	-50.0	-0.4 %
Apr-24	14,106.00	-88.0	-0.6 %
Q2 24	13,902.00	-54.33	-0.4 %
Q3 24	13,500.00	-75.0	-0.6 %
Q4 24	13,188.00	-62.0	-0.5 %
Q1 25	11,850.00	12.0	12.0 %
Q2 25	12,301.00	-53.0	-0.4 %
Cal 25	12,188.25	-36.75	-0.3 %
Cal 26	11,775.00	0.0	0.0 %
Cal 27	11,575.00	0.0	0.0 %



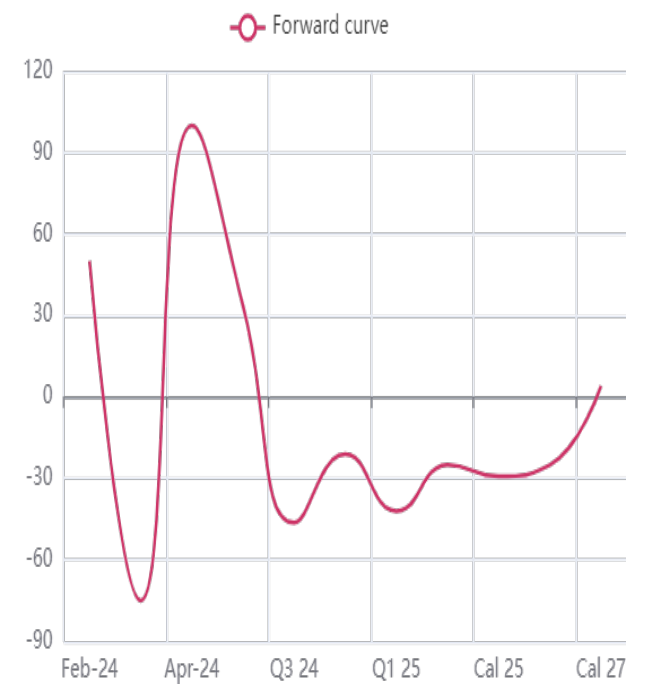
## 巴拿马型散货船Panamax

4TC	\$/day	WoW	
Feb-24	13,332.00	-50.0	-0.4 %
Mar-24	15,854.00	-267.0	-1.7 %
Apr-24	16,939.00	-172.0	-1.0 %
Q2 24	16,674.67	-119.67	-0.7 %
Q3 24	15,571.33	-90.0	-0.6 %
Q4 24	15,243.00	-61.0	-0.4 %
Q1 25	12,996.00	-47.0	-0.4 %
Q2 25	14,046.00	-47.0	-0.3 %
Cal 25	13,479.00	-46.0	-0.3 %
Cal 26	12,393.00	-46.0	-0.4 %
Cal 27	12,079.00	15.0	0.1 %



超大灵便型散货船Supramax

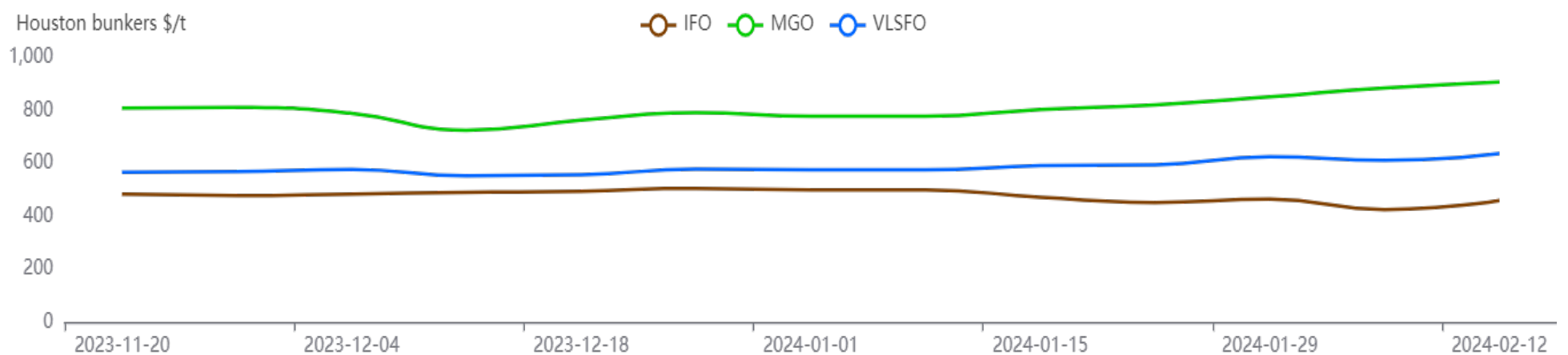
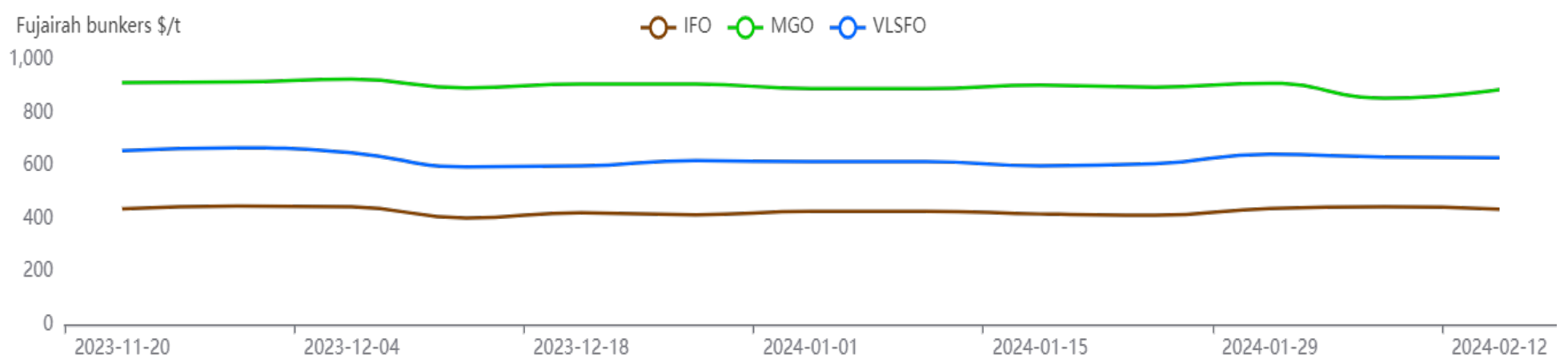
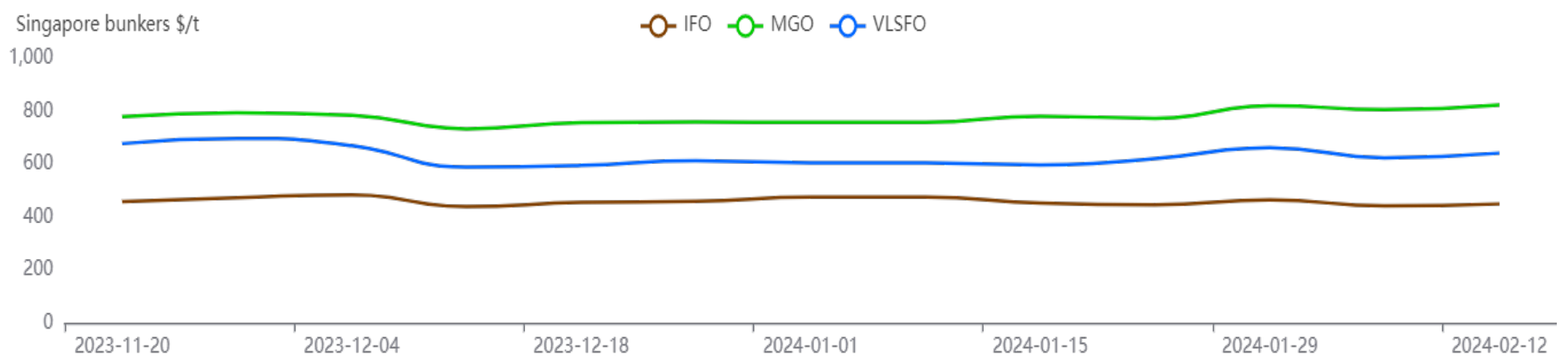
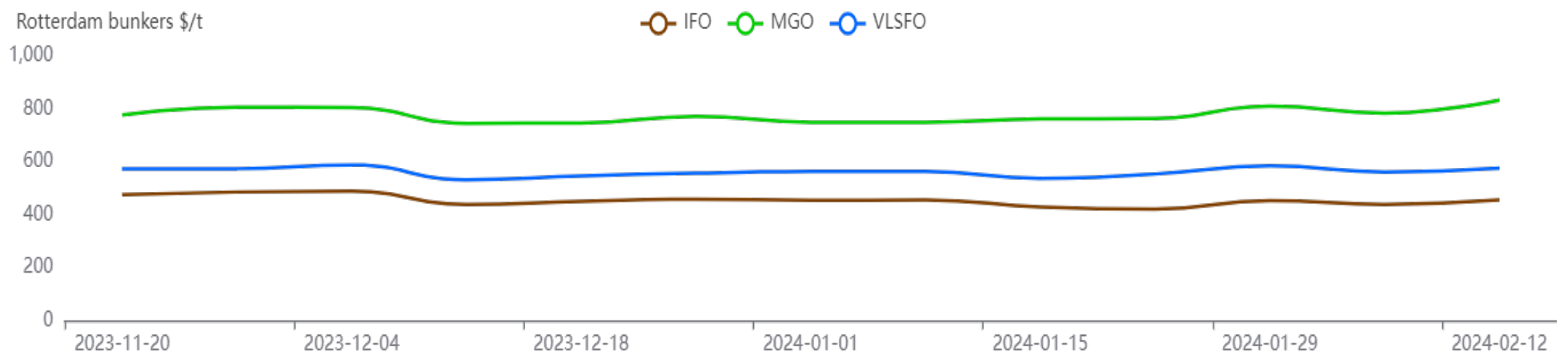
10TC	\$/day	WoW	
Feb-24	12,150.00	50.0	0.4 %
Mar-24	15,171.00	-75.0	-0.5 %
Apr-24	15,983.00	100.0	0.6 %
Q2 24	15,640.33	33.67	0.2 %
Q3 24	14,746.00	-46.33	-0.3 %
Q4 24	14,492.00	-21.0	-0.1 %
Q1 25	12,600.00	-42.0	-0.3 %
Q2 25	13,033.00	-25.0	-0.2 %
12,924.75	Cal 25	-29.25	-0.2 %
Cal 26	12,171.00	-25.0	-0.2 %
Cal 27	11,971.00	4.0	0.0 %



## 第六部分 燃油价格 BUNKER PRICE

MP	LO	HO	MO	SP	WoW	W%	M%
zhoushan	663.0	469.0	873.5	194.0	-11.0	-5.37	22.78
Singapore	642.0	450.0	823.5	192.0	10.0	5.49	33.33
Rotterdam	575.5	456.5	833.5	119.0	-4.0	-3.25	10.19
Fujairah	631.0	436.0	887.5	195.0	7.5	4.0	7.14
Houston	637.0	459.5	907.5	177.5	-9.0	-4.83	49.16

(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		215.0	-1.0	-0.46	-2.27	-23.77
Maize		198.0	-7.0	-3.41	1550.0	-37.01
Soybeans		217.0	-2.0	-0.91	-6.47	-28.94
Rice		263.0	-1.0	-0.38	-0.38	29.98
Barley		212.0	-4.0	-1.85	-3.64	-30.59
Energy		Index	+/-	Weekly	Monthly	YTD
Crude Oil	USD/Bbl	76.32	4.43	6.16	5.37	3.29
Brent	USD/Bbl	81.68	4.69	6.09	4.89	1.62
Natural Gas	USD/MMBtu	1.82	-0.27	-12.92	-42.04	-23.85
Gasoline	USD/Gal	2.33	0.19	8.88	9.39	0.43
Heating Oil	USD/Gal	2.91	0.24	8.99	8.99	4.3
Ethanol	USD/Gal	1.59	0.01	0.63	0.63	-27.06
Naphtha	USD/T	664.93	44.68	7.2	5.67	-3.51
Propane	USD/Gal	0.92	0.0	0.0	17.95	15.0
Uranium	USD/Lbs	106.0	6.0	6.0	14.59	107.03
Methanol	CNY/T	2571.0	54.0	2.15	7.17	-5.76
TTF Gas	EUR/MWh	26.26	-2.89	-9.91	-13.28	-54.41
UK Gas	GBP/thm	64.42	-6.58	-9.27	-14.26	-56.18
Industrial		Index	+/-	Weekly	Monthly	YTD
Copper	USD/Lbs	3.68	-0.13	-3.41	-1.87	-9.58
Coal	USD/T	120.6	4.6	3.97	-7.83	-48.9
Steel	CNY/T	3901.0	19.0	0.49	2.68	-2.11
Iron Ore	USD/T	128.0	-2.5	-1.92	-3.76	1.19
Aluminum	USD/T	2212.5	-15.0	-0.67	0.2	-13.89
Iron Ore Fe 62%	USD/T	2212.5	-15.0	-0.67	0.2	-13.89
Metals		Index	+/-	Weekly	Monthly	YTD
Gold	USD/t.oz	2023.1	-0.3	-0.01	-1.6	7.63
Silver	USD/t.oz	22.9	0.5	2.23	-1.72	1.51
Platium	USD/t.oz	875.6	-16.2	-1.82	-4.24	-10.55
Currencies		Index	+/-	Weekly	Monthly	YTD
EUR/USD		1.08	0.0	0.0	-1.82	0.0
USD/CNY		7.22	0.0	0.0	0.42	6.49

## 第八部分 本周话题 WEEKLY TOPIC



### 2023年中国煤炭进口创新高和2024年中国煤炭进口展望

长期以来，中国海运煤炭进口一直是海运干散货贸易的重要驱动因素，但2023年的进口量超出了所有人的预期，创下了历史新纪录，全年同比增长46%，达到创纪录的3.4亿吨，比2022年的水平增加了1.1亿吨，这里我们一起来看看推动中国海运煤炭进口有哪些因素，并展望2024年需要关注的趋势。

2023年，全球煤炭海运增量都来自中国，其他主要地区，尤其是欧洲和印度的进口要么放缓，要么保持稳定。事实上，去年全球海运干散货贸易增长量在2亿吨水平，中国的煤炭的增量超过一半水平。

2023中国海运煤炭进口量创历史新高，反映了一系列关键因素的共同作用。第一：2023年动力煤价格整体下跌了约50%，当前煤炭价格相比2023年9月份价格更是下跌了60%以上。第二：中国煤炭价格在2023年上涨，这使得进口煤炭对中国买家更具吸引力。第三：澳大利亚的煤炭进口在2023年重新恢复，从俄罗斯的煤炭进口也进一步增长。第四：2023年中国水力发电疲软提振了动力煤需求。第五：钢铁产量高位运行支撑了炼焦煤需求。

市场总会趋利避害，中国整体宏观经济并不乐观，直接影响中国市场对于大宗商品的需求。我们预测2024年中国煤炭价格会向市场靠拢；中国水力发电可能有所改善；中国脱碳的进一步发展等因素会限制石化能源的消耗；这些因素都将促使2024年煤炭的进口量出现下滑。船队在线hiFleet时刻关注大宗商品流动情况，密切关注海运干散货相对变化情况，欢迎您随时垂询。

China's seaborne coal imports have long been a significant driver of dry bulk trade, but imports in 2023 are out of all expectations and set an all-time new record, growing 46 per cent year-on-year for the full year to a record 340 million tonnes, up 110 million tonnes from 2022 levels. Here we take a look at the factors driving China's seaborne coal imports and discuss the trends to watch for in 2024.

In 2023, all of the increase in global seaborne coal will come from China, while imports from other major regions, notably Europe and India, will either slow down or remain fairly stable. In fact, last year, global seaborne dry bulk trade increased by 200 million tons, and China's coal increased by more than half the level.

China's seaborne coal imports hit a record high in 2023, reflecting the confluence of a number of key factors. First, the overall price of thermal coal in 2023 has fallen by about 50%, and the current coal price has fallen by more than 60% compared with the price in September 2023. Second: Chinese coal prices rise in 2023, which makes imported coal more attractive to Chinese buyers. Third: Australia's coal imports resumed in 2023, and coal imports from Russia also increased further. Fourth: Weak hydropower generation in China in 2023 boosts thermal coal demand. Fifth: High steel production has supported coking coal demand.

The market will always seek advantages and avoid disadvantages, and China's overall macro-economy is not optimistic, which directly affects the demand for commodities in the Chinese market. We forecast that Chinese coal prices will move closer to the market in 2024; China's hydropower may improve; The further development of China's decarbonization and other factors will limit the consumption of petrochemical energy; These factors will contribute to a decline in coal imports in 2024. hiFleet always pay attention to the flow of bulk commodities, pay close attention to the relative changes in sea dry bulk cargo, you are welcome to contact us at any time.