



2024年 第3周市场周报

Contents

第一部分

航运安全 SHIPPING SAFETY

第二部分

航运数据 SHIPPING DATA

第三部分

航运市场 SHIPPING MARKET

第四部分

运力分布 SUPPLY DISTRIBUTION

第五部分

远期运价协议 FFA

第六部分

燃油价格 BUNKER PRICE

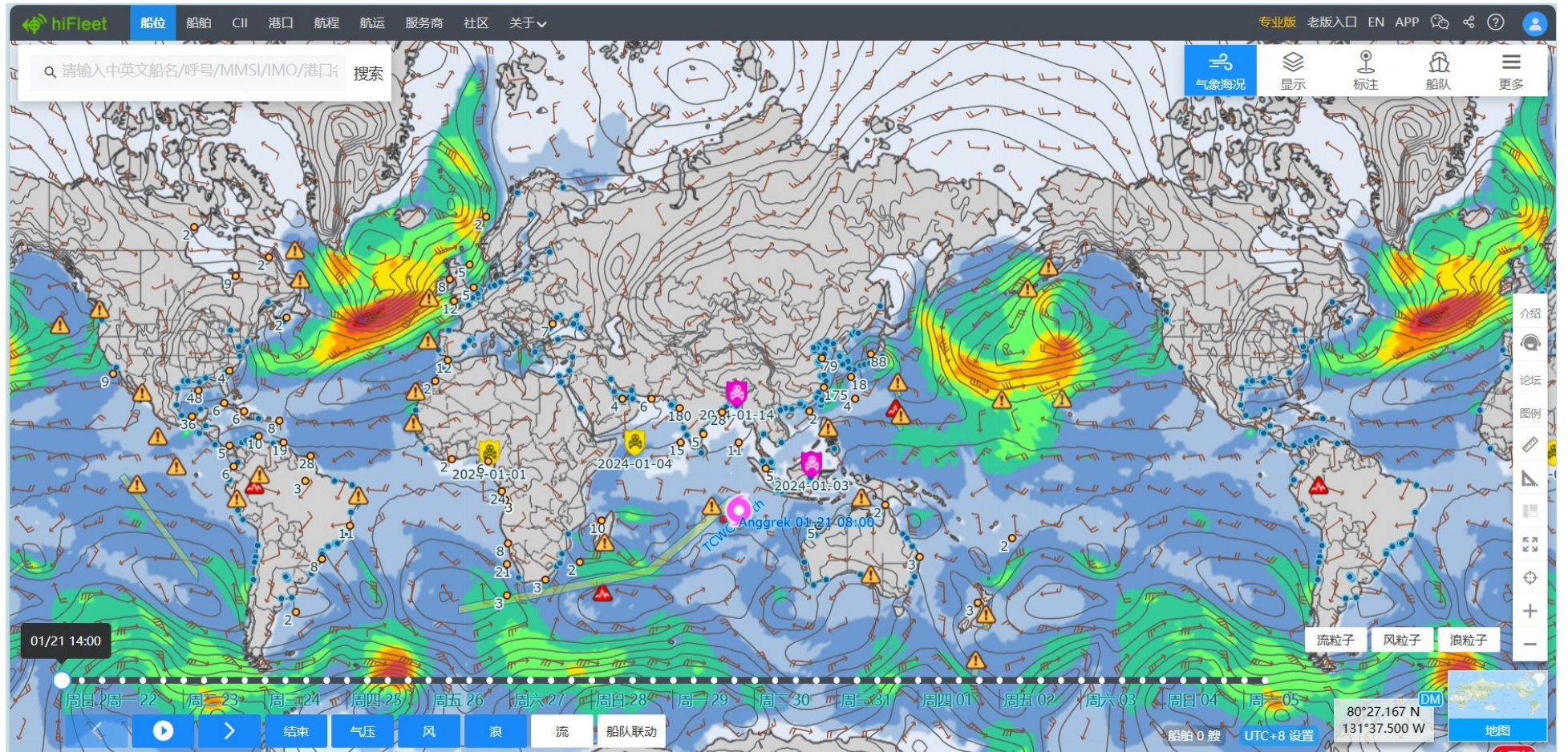
第七部分

最新商品价格 LATEST COMMODITIES PRICE

第八部分

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1016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 1016 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5-6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，有3米大浪。辽东湾最大浮冰范围30-40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 breeze to gale with the seas from moderate to very rough. The wind in the Taiwan Strait will experience 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 strong with rough sea. Low-pressure in the north of North Atlantic Ocean and Pacific is strong, rough sea conditions.

海盗事件 Piracy

在1月15日夜晚，安克雷奇锚地，安哥拉。窃贼登上了一艘停泊在海上的补给船，偷走了船上的财物后潜逃。盗窃是在早上例行查房时发现。14.01.2024: Night Hours: Posn: 06:05S - 012:15E, Soyo Anchorage, Angola. Unnoticed, thieves boarded an anchored offshore supply vessel, stole ship's properties and escaped. The theft was noticed during routine rounds in the morning hours.

海上事件 Marine Incidents

据hiFleet大数据显示，北京时间1月15日下午5点左右一艘美国极限灵便散货船遭到不明方向炮弹袭击，幸运的是无船员在此次袭击中受伤。该船在受到炮弹袭击后，立即就采取了掉头并逃离曼德海峡的措施。该船是2023年平安夜离开韩国Pohang，但在2024年1月15日傍晚于亚丁湾西行中就碰到不平安的炮弹袭击。According to hiFleet big data, at about 5 PM on January 15 Beijing time, a US Ultramax was attacked by an unknown direction shell, and fortunately no crew was injured in the attack. As soon as the ship was hit by a shell, it took measures to turn around and flee the Bab el-Mandeb Strait. The ship left Pohang, South Korea, on Christmas Eve 2023, but was hit by an unpeaceful shell while westbound in the Gulf of Aden on the evening of January 15, 2024.

其它 Others

无 Nil

备注 Remark

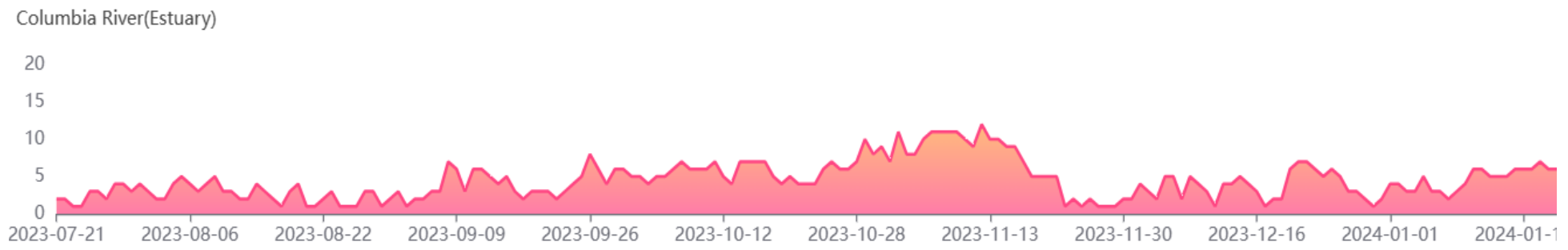
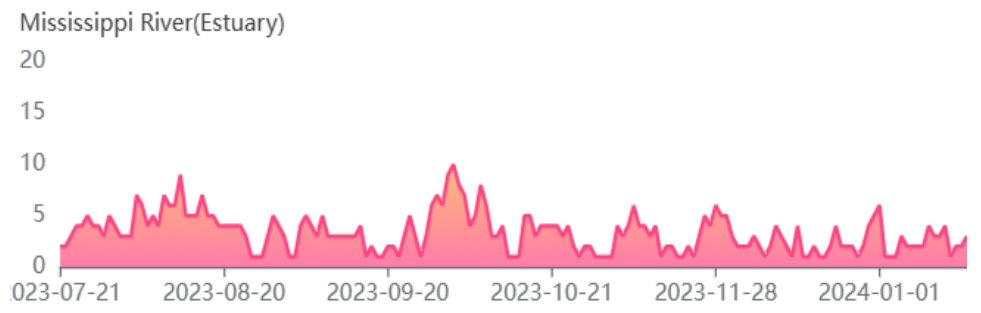
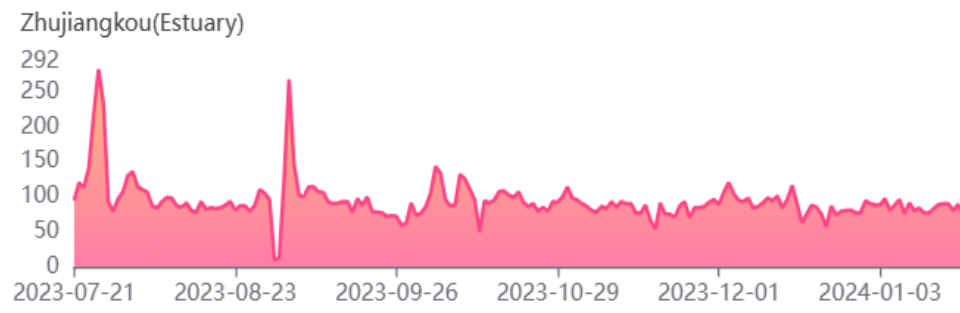
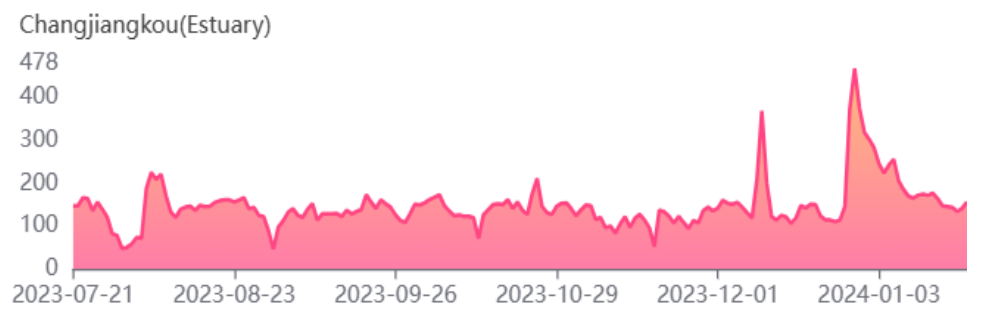
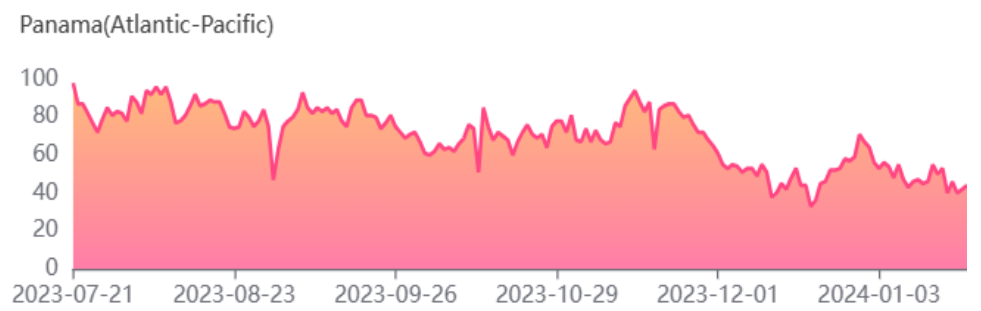
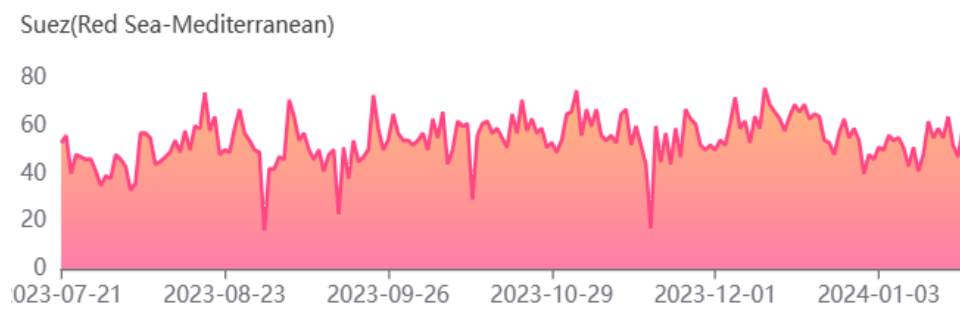
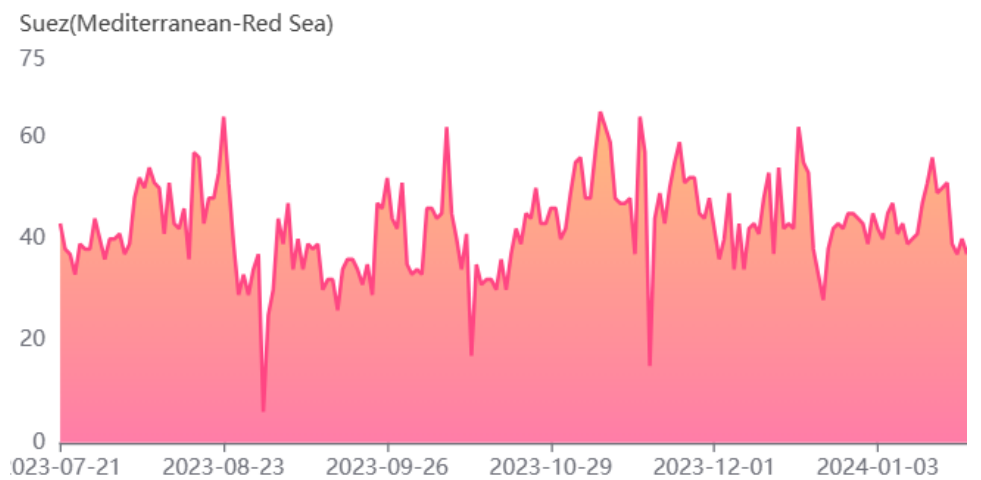
本报告数据截止时间为2024年1月21日北京时间17点；所有数据和或观点仅供参考，在任何情况下本公司及其员工不承担任何风险。The data deadline for this report is Beijing time 17 hours on January 21 of 2024; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

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	55	1531	40	-232
Miss.Riv.	3	56	10	-18
CJK	156	6020	-214	1801
Pa.Atlan.	44	1499	-14	-10
Colum.Riv.	6	125	13	26
Suez.Med.	37	1261	1	-10
Pa.Pac.	51	1613	-11	-393
ZJK	70	2429	3	-189

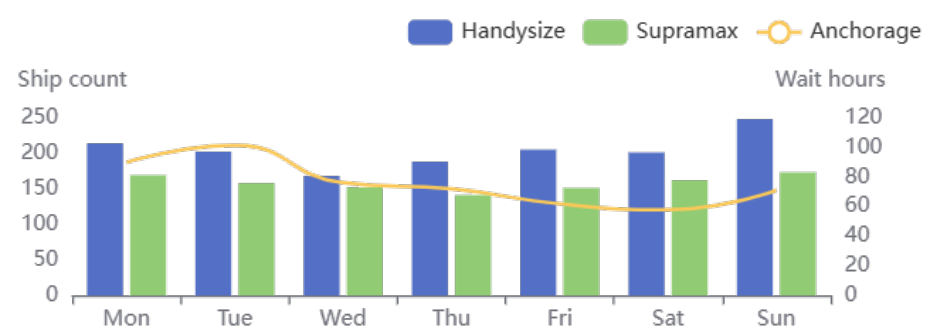


(P.N.-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

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

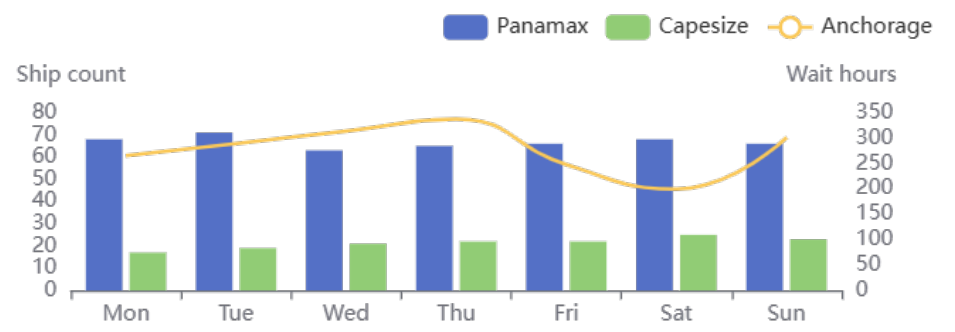
Type	M	T	W	Th	F	Sat	Sun
HDY	214	202	168	188	205	201	248
SMX	169	158	152	141	151	162	173
WT.h.	89.9	101.4	76	71.9	61.8	57.8	71



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

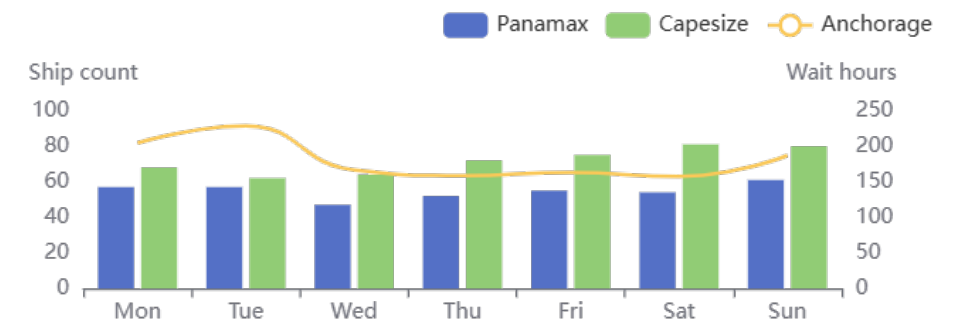
Type	M	T	W	Th	F	Sat	Sun
Pan.	68	71	63	65	66	68	66
Cap	17	19	21	22	22	25	23
WT.h.	265.4	289.4	313.4	337.4	247.9	199.8	301



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

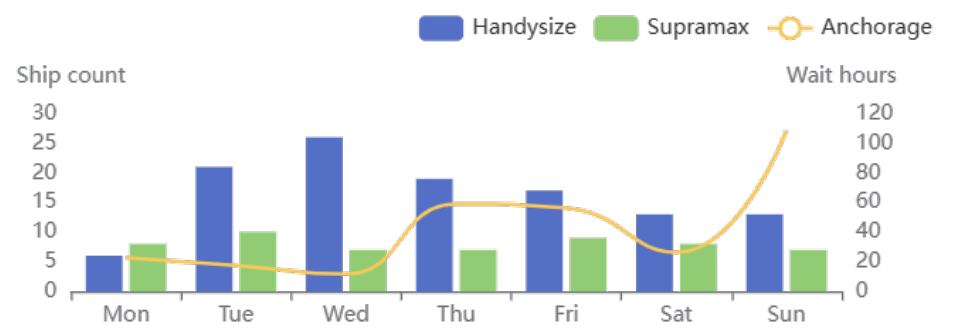
Type	M	T	W	Th	F	Sat	Sun
Pan.	57	57	47	52	55	54	61
Cap	68	62	64	72	75	81	80
WT.h.	204.6	228.6	166.6	158.6	163.2	157.3	187



最近一周黑海区域超大型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

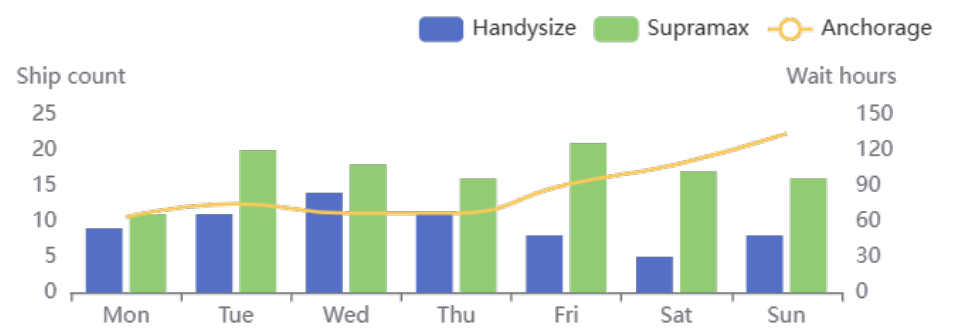
Type	M	T	W	Th	F	Sat	Sun
HDY	6	21	26	19	17	13	13
SMX	8	10	7	7	9	8	7
WT.h.	22.75	17.5	11.7	59.1	56.3	26.3	108.5



最近一周美湾区域超大型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

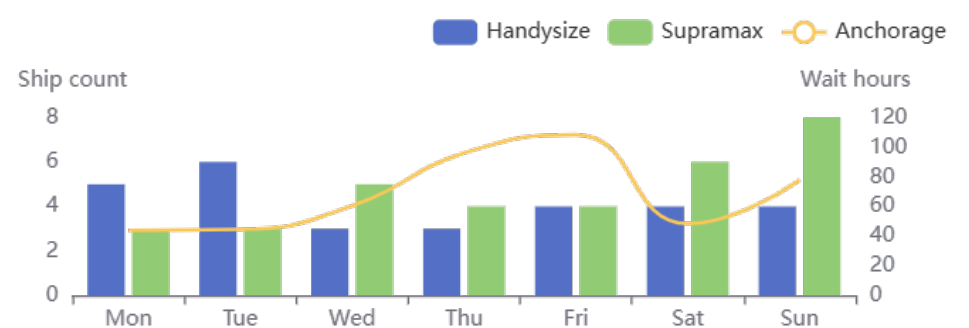
Type	M	T	W	Th	F	Sat	Sun
HDY	9	11	14	11	8	5	8
SMX	11	20	18	16	21	17	16
WT.h.	63.6	74.7	66.9	66.9	91	108	134



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

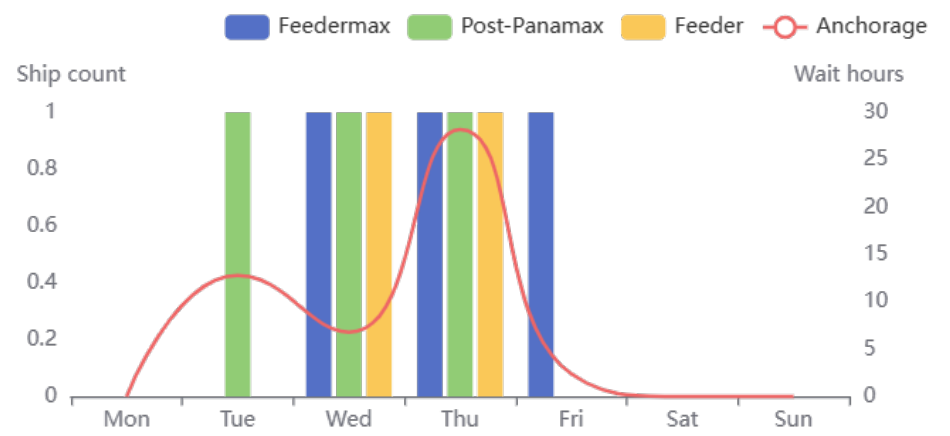
Type	M	T	W	Th	F	Sat	Sun
HDY	5	6	3	3	4	4	4
SMX	3	3	5	4	4	6	8
WT.h.	43.9	44.6	60.45	96.1	108.45	48.4	78



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

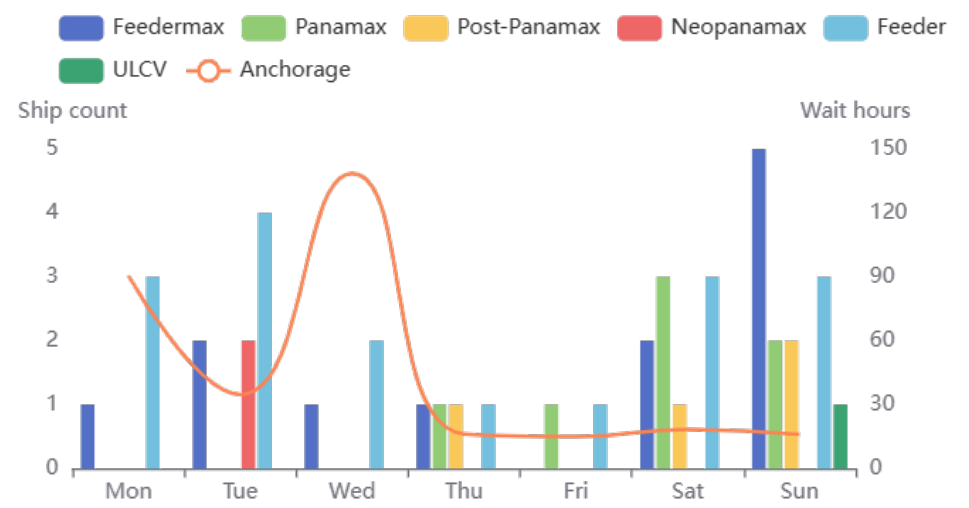
Type	M	T	W	Th	F	Sat	Sun
F.ma.	0	0	1	1	1	0	0
Pan.	0	0	0	0	0	0	0
PPx	0	1	1	1	0	0	0
NPx	0	0	0	0	0	0	0
Fd	0	0	1	1	0	0	0
WT.h.	0.0	12.8	6.8	28.2	2.4	0.0	0.0
UlcV	0	0	0	0	0	0	0



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

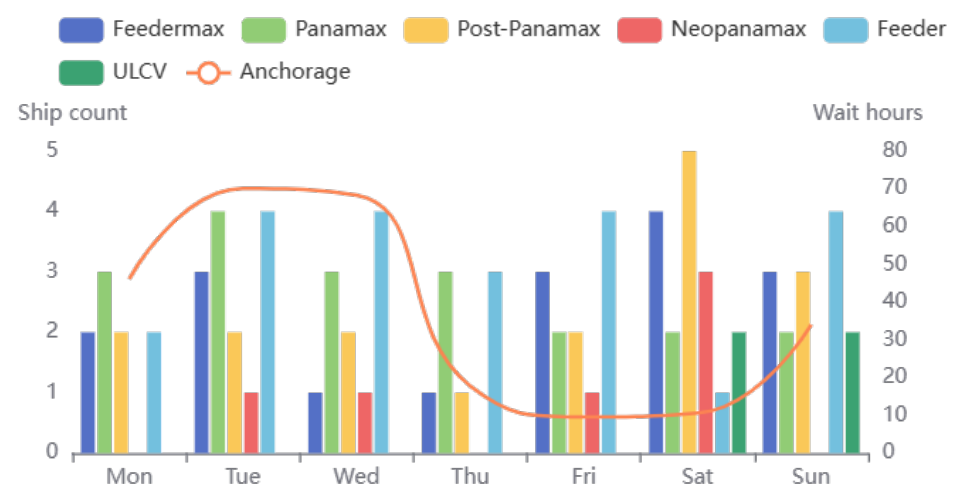
Type	M	T	W	Th	F	Sat	Sun
F.ma.	1	2	1	1	0	2	5
Pan.	0	0	0	1	1	3	2
PPx	0	0	0	1	0	1	2
NPx	0	2	0	0	0	0	0
Fd	3	4	2	1	1	3	3
UlcV	0	0	0	0	0	0	1
WT.h.	90.5	34.7	138.5	16.2	15.0	18.3	16



最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

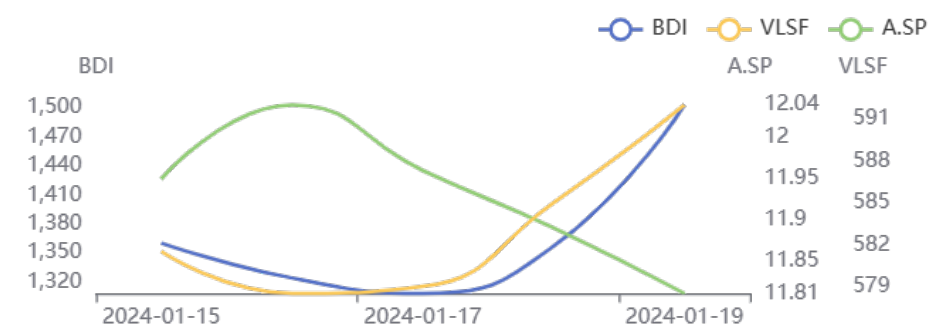
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

Type	M	T	W	Th	F	Sat	Sun
F.ma.	2	3	1	1	3	4	3
Pan.	3	4	3	3	2	2	2
PPx	2	2	2	1	2	5	3
NPx	0	1	1	0	1	3	0
Fd	2	4	4	3	4	1	4
UlcV	0	0	0	0	0	2	2
WT.h.	46.2	70.1	68.3	17.8	9.6	10.6	34



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

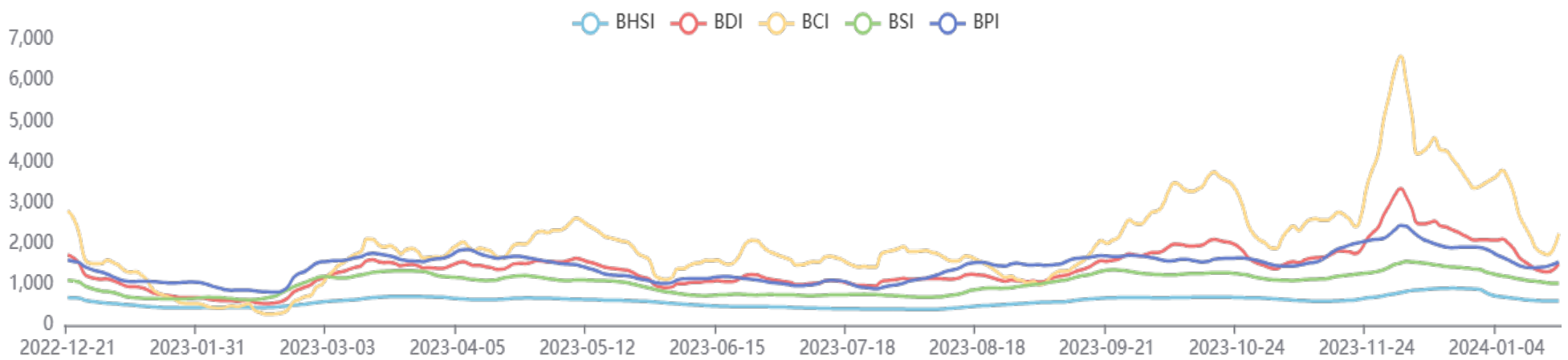
Type	M	T	W	Th	F	Sat	Sun
BDI	1412	1421	1446	1853	1550		
VLSF	581.5	578.5	579	585	592		
A.SP	11.95	12.04	11.96	11.89	11.81	11.77	



第三部分 航运市场 SHIPPING MARKET

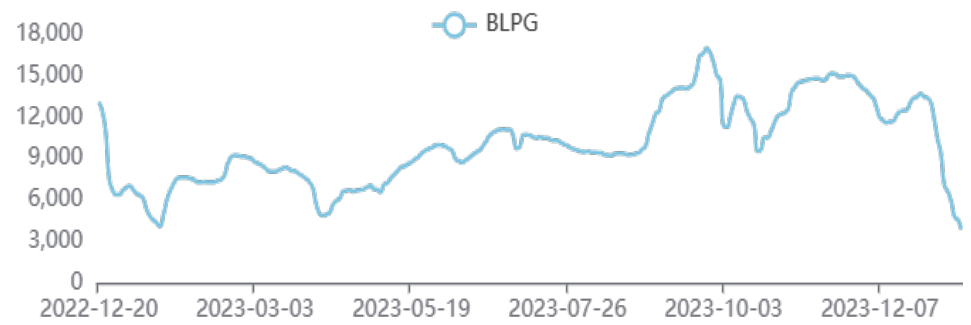
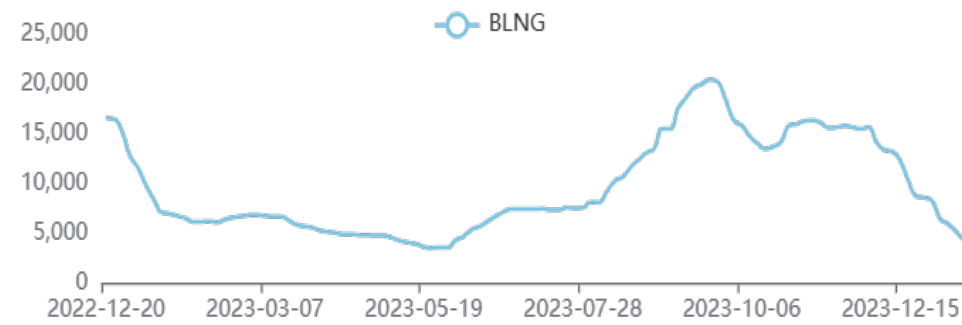
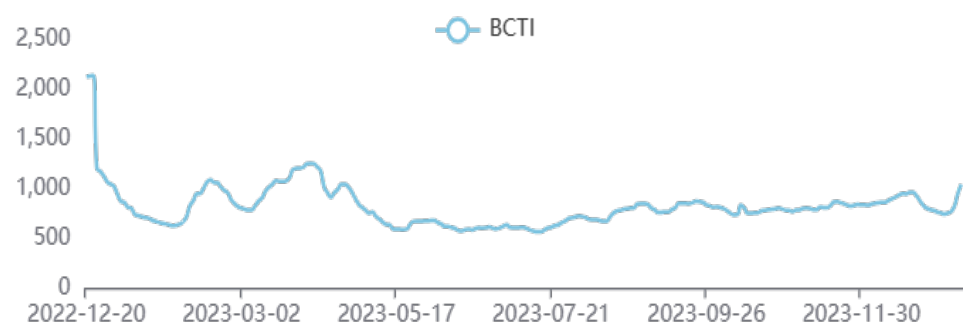
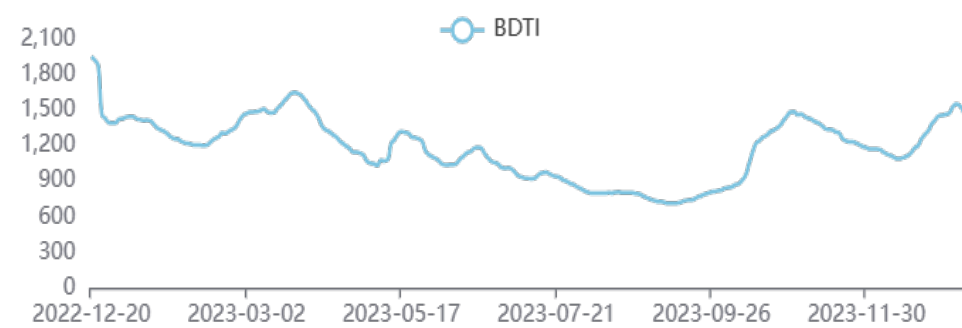
波罗的海干散货指数Baltic Dry Index

Type	PI	WoW	W%	M%	y%
BDI	1503	43.0	2.95	-28.22	87.64
BCI	2244	72.0	3.31	-33.96	151.29
BPI	1550	140.0	9.93	-18.81	44.72
BSI	1030	-58.0	-5.33	-24.76	57.49
BHSI	594	-22.0	-3.57	-32.42	32.29

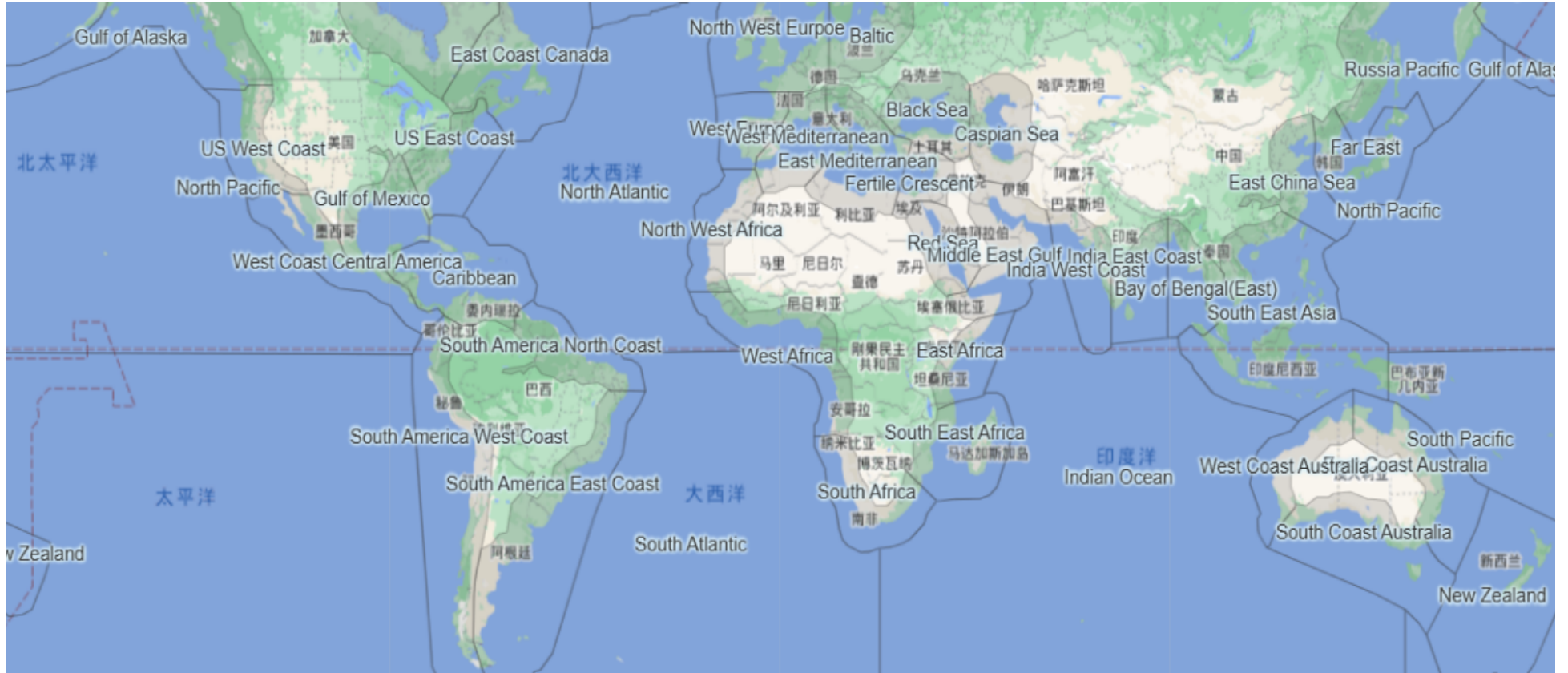


能源运价指数Energy Shipping Index

Type	PI	WoW	W%	M%	y%
BDTI	1423	-50.0	-3.39	18.58	0.78
BCTI	1039	298.0	40.22	8.23	43.11
BLNG	4325	-1583.0	-26.79	-50.33	-38.9
BLPG	3874	-3229.0	-45.46	-71.03	-19.88



第四部分 运力分布 SUPPLY DISTRIBUTION

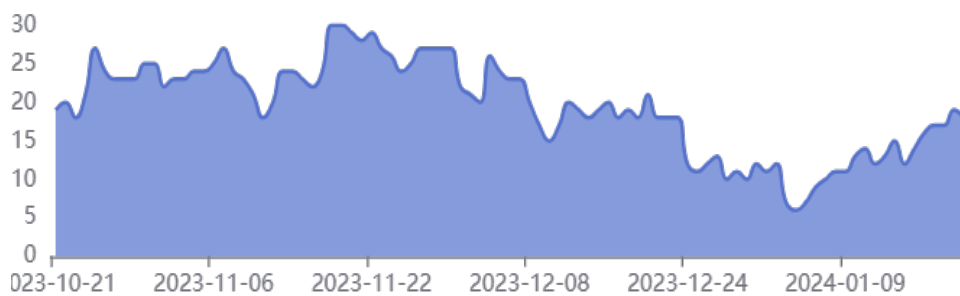


好望角型散货船 Capesize

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.

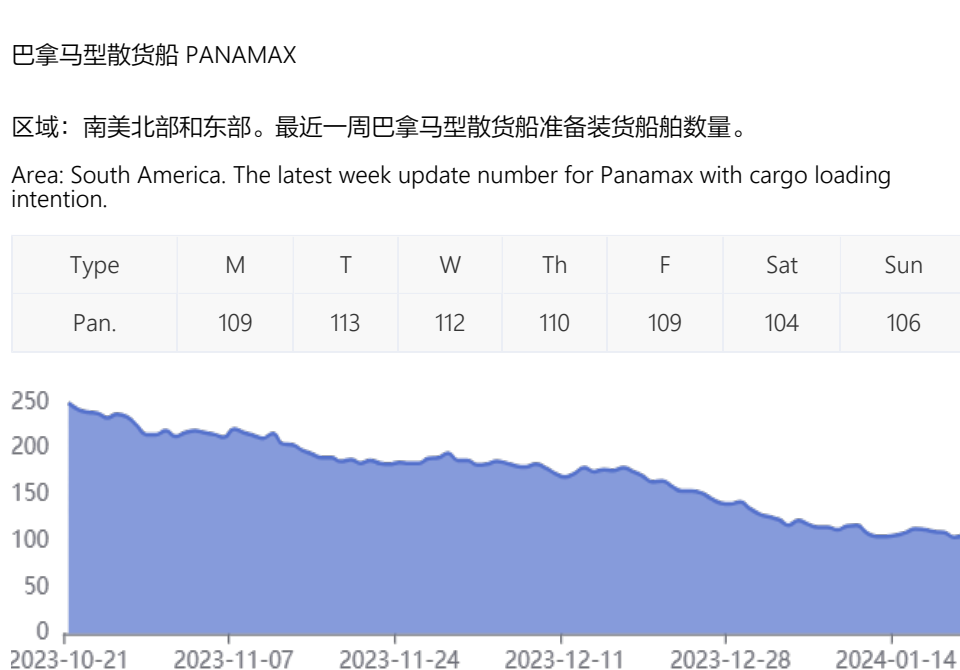
Type	M	T	W	Th	F	Sat	Sun
Cape	12	14	16	17	17	19	18



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	16	18	19	20	15	16	21

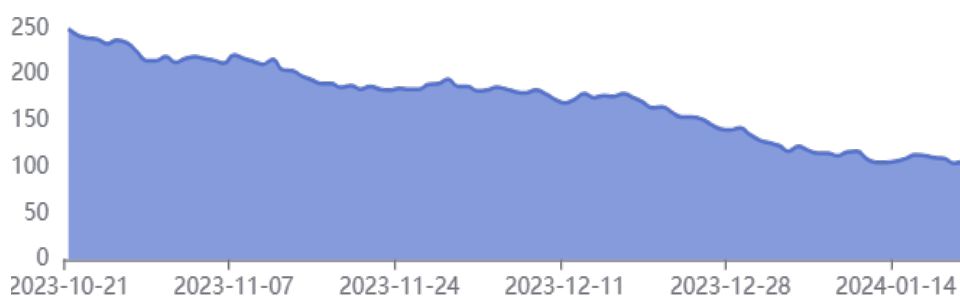


巴拿马型散货船 PANAMAX

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.

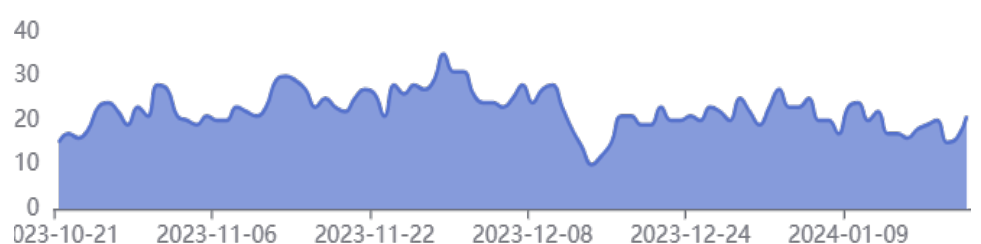
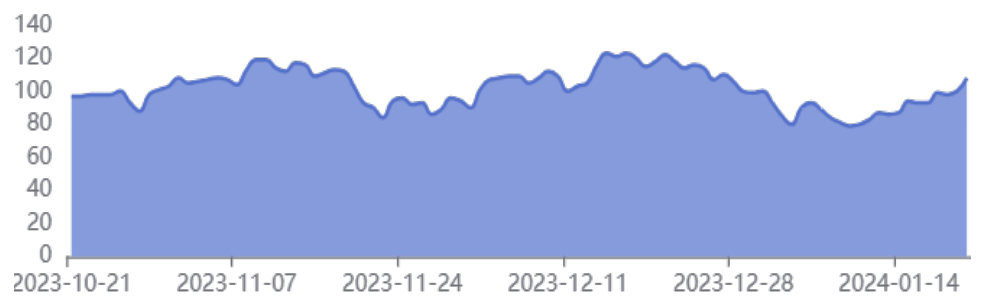
Type	M	T	W	Th	F	Sat	Sun
Pan.	109	113	112	110	109	104	106



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.

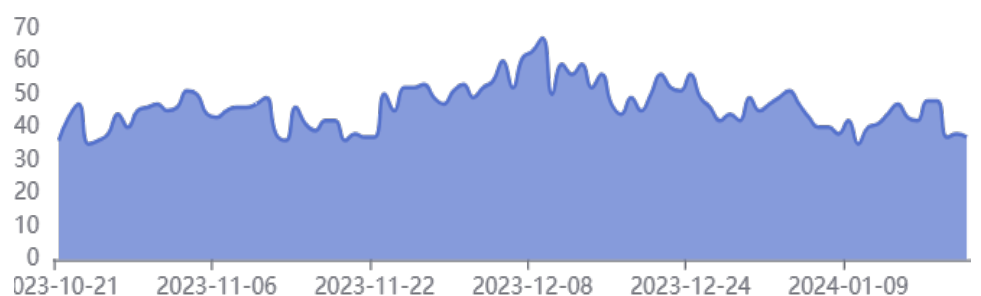
Type	M	T	W	Th	F	Sat	Sun
Cape	94	93	93	99	98	100	108



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.

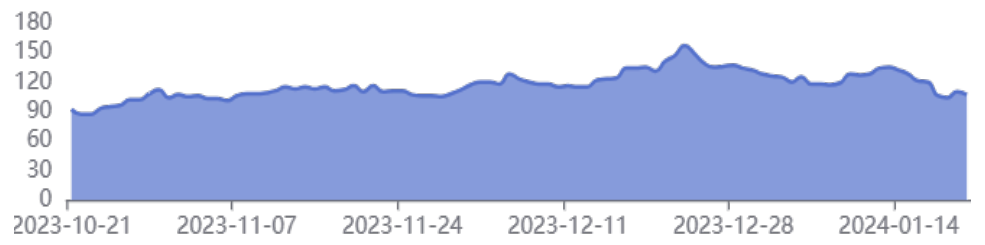
Type	M	T	W	Th	F	Sat	Sun
Pan.	35	35	33	36	35	36	36



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.	128	121	120	106	104	110	107

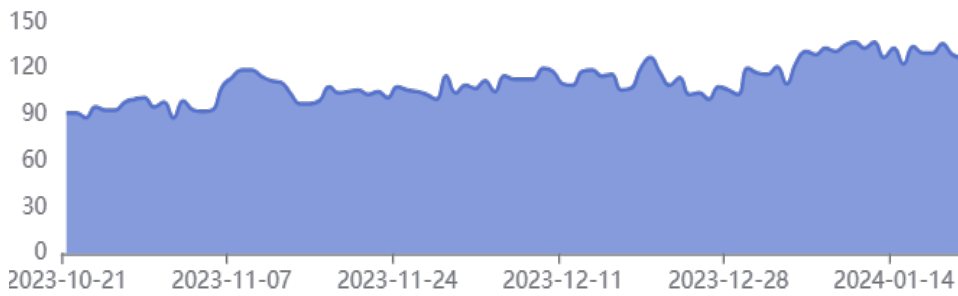


超大灵便型散货 SUPRAMAX

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.

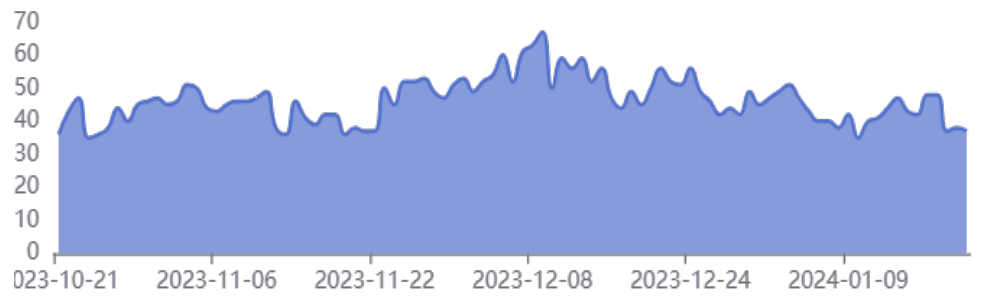
Type	M	T	W	Th	F	Sat	Sun
SMX	123	134	130	130	136	129	127



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.

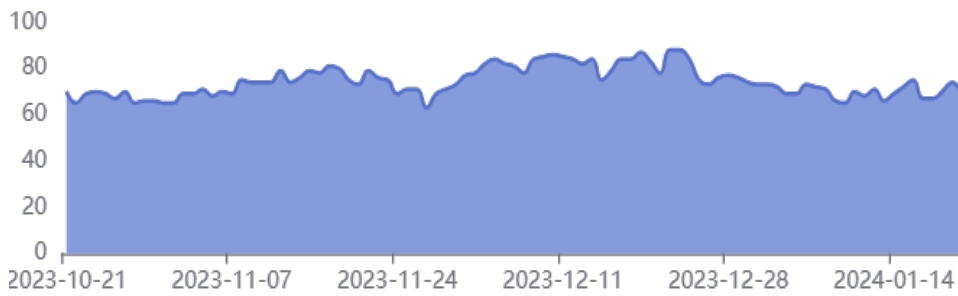
Type	M	T	W	Th	F	Sat	Sun
SMX	43	42	48	48	37	38	37



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.

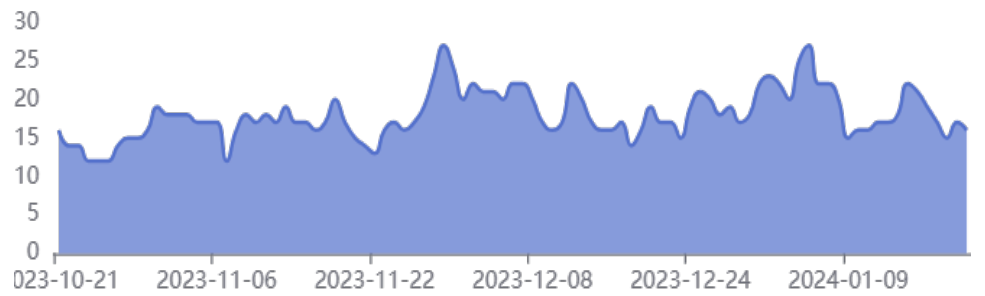
Type	M	T	W	Th	F	Sat	Sun
SMX	22	21	19	17	15	17	16



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.

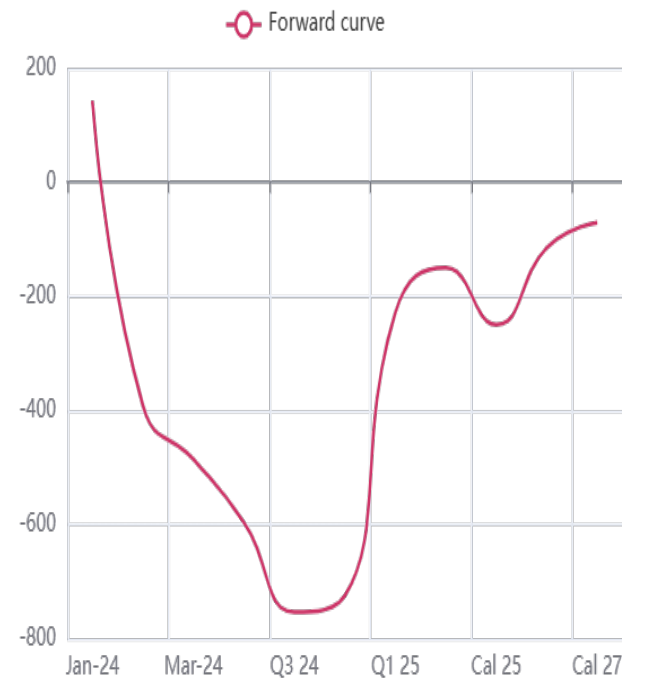
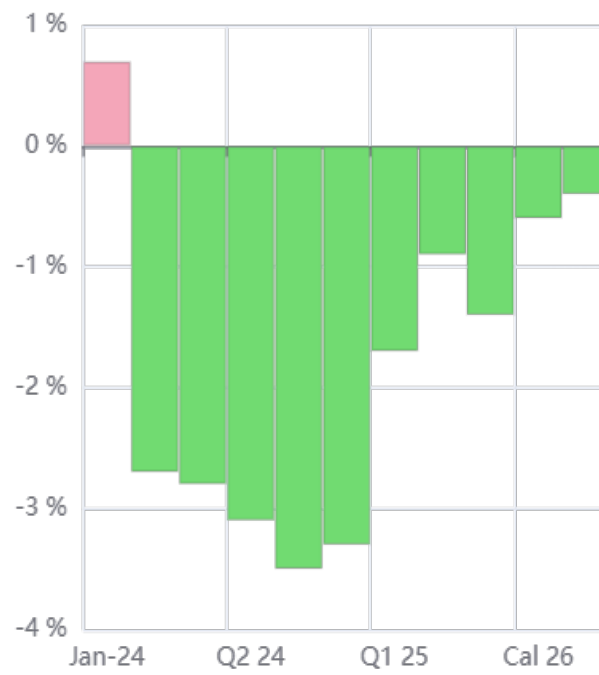
Type	M	T	W	Th	F	Sat	Sun
SMX	72	75	67	67	70	74	69



第五部分 远期运价协议 FFA

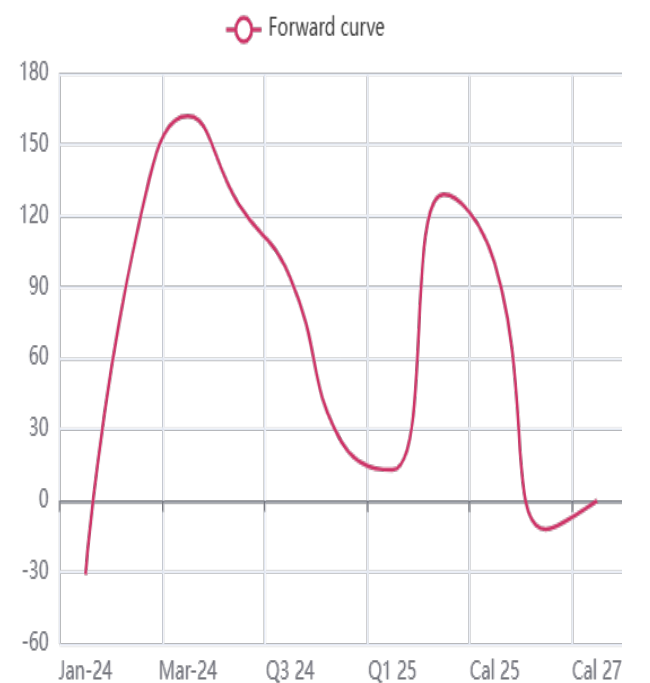
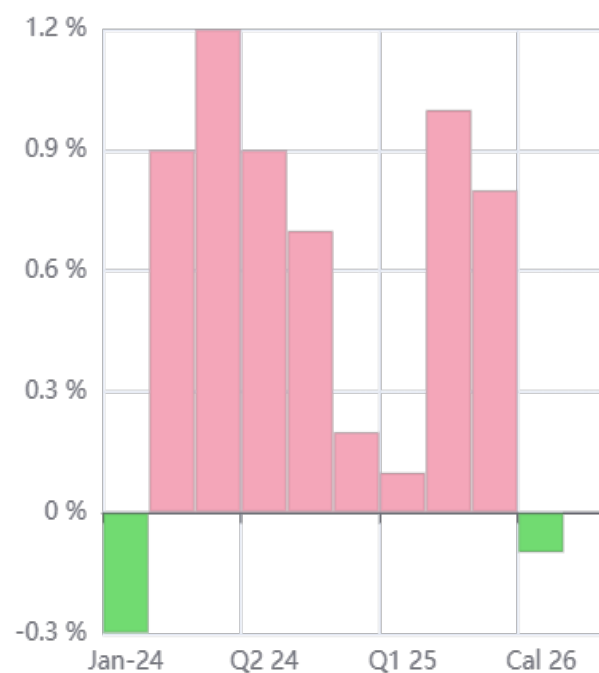
好望角型散货船Capesize

5TC	\$/day	WoW	
Jan-24	20,857.00	143.0	0.7 %
Feb-24	14,279.00	-392.0	-2.7 %
Mar-24	16,964.00	-486.0	-2.8 %
Q2 24	18,694.00	-596.33	-3.1 %
Q3 24	20,850.00	-754.0	-3.5 %
Q4 24	21,293.00	-725.0	-3.3 %
Q1 25	13,207.00	-229.0	-1.7 %
Q2 25	16,895.00	-150.0	-0.9 %
Cal 25	17,682.00	-250.0	-1.4 %
Cal 26	17,614.00	-115.0	-0.6 %
Cal 27	17,550.00	-71.0	-0.4 %



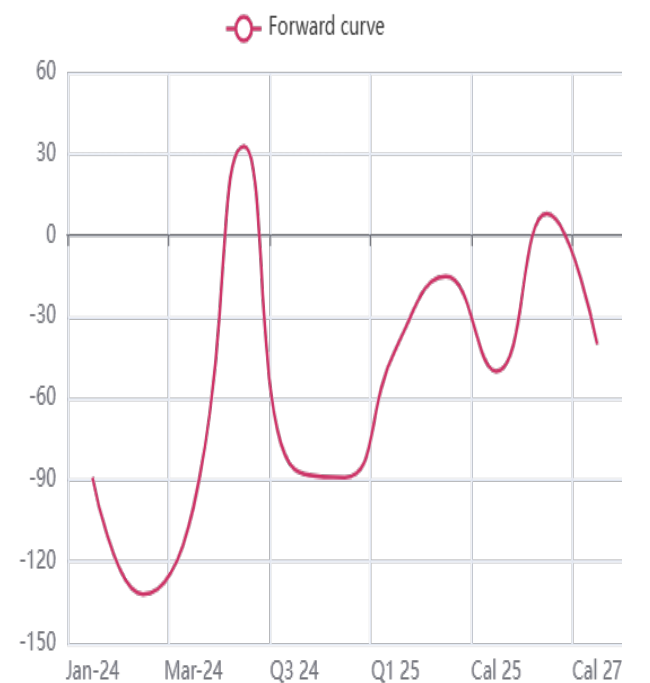
灵便型散货船Handysize

7TC	\$/day	WoW	
Jan-24	11,750.00	-31.0	-0.3 %
Feb-24	12,100.00	112.0	0.9 %
Mar-24	14,225.00	162.0	1.2 %
Q2 24	14,121.00	124.67	0.9 %
Q3 24	13,900.00	94.0	0.7 %
Q4 24	13,425.00	25.0	0.2 %
Q1 25	11,813.00	13.0	13.0
Q2 25	12,496.00	129.0	1.0 %
Cal 25	12,325.25	100.0	0.8 %
Cal 26	11,688.00	-12.0	-0.1 %
Cal 27	11,475.00	0.0	0.0 %



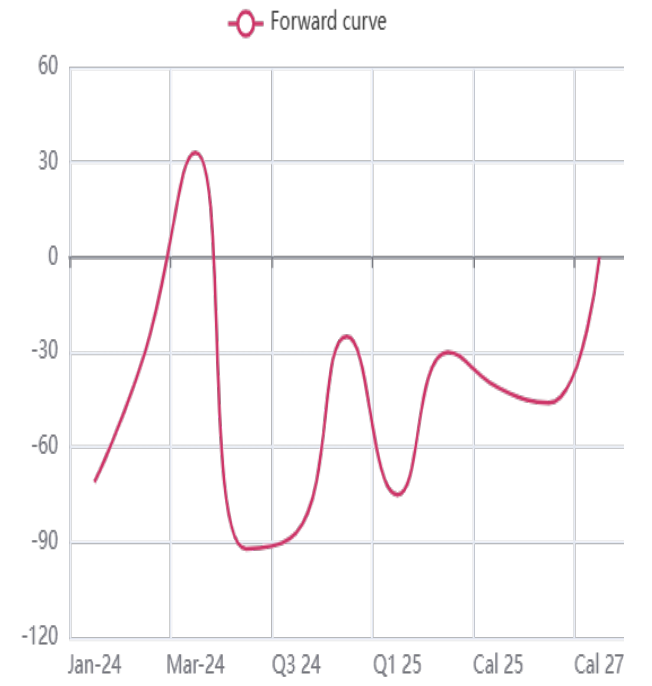
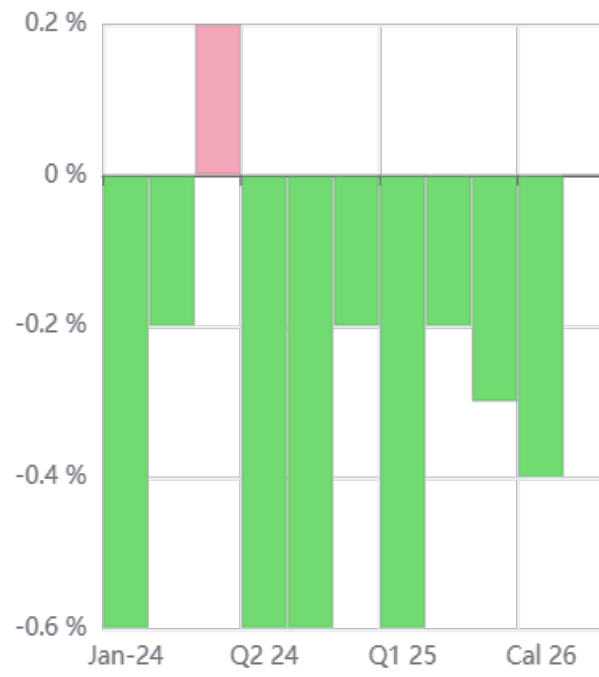
巴拿马型散货船Panamax

4TC	\$/day	WoW	
Jan-24	12,932.00	-89.0	-0.7 %
Feb-24	13,543.00	-132.0	-1.0 %
Mar-24	15,389.00	-100.0	-0.6 %
Q2 24	15,618.67	32.67	0.2 %
Q3 24	14,621.00	-86.0	-0.6 %
Q4 24	14,093.00	-89.0	-0.6 %
Q1 25	12,229.00	-42.0	-0.3 %
Q2 25	13,164.00	-15.0	-0.1 %
Cal 25	12,582.00	-50.0	-0.4 %
Cal 26	12,029.00	8.0	0.1 %
Cal 27	11,864.00	-40.0	-0.3 %



超大灵便型散货船Supramax

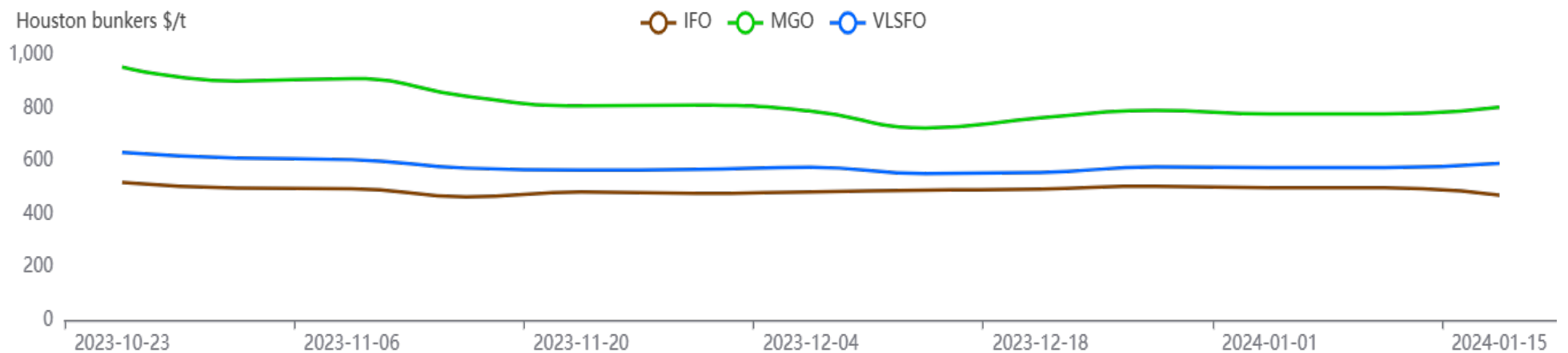
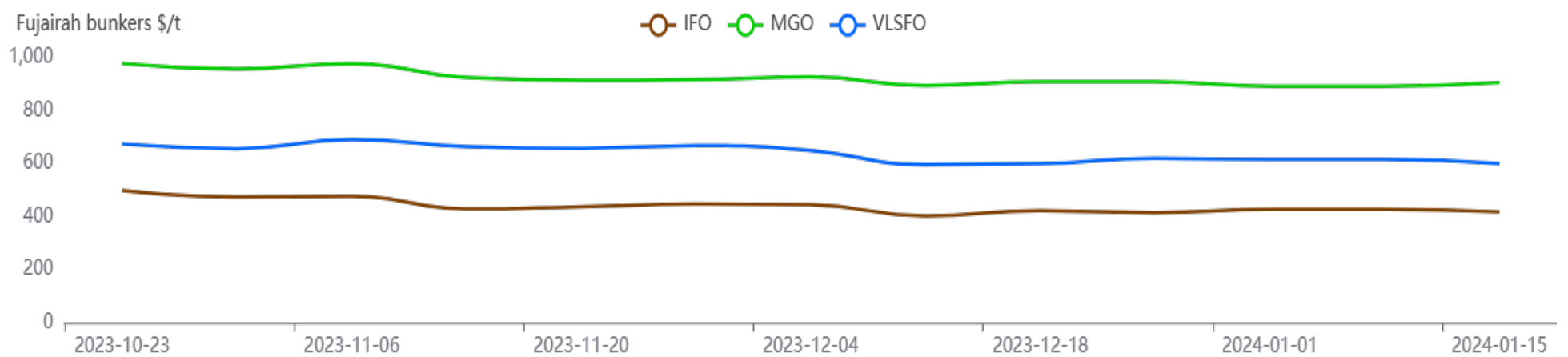
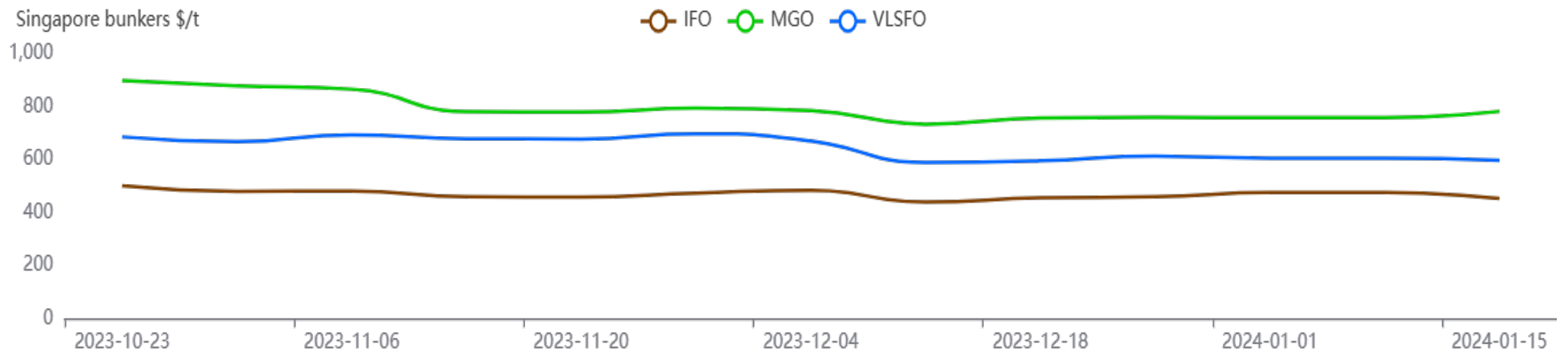
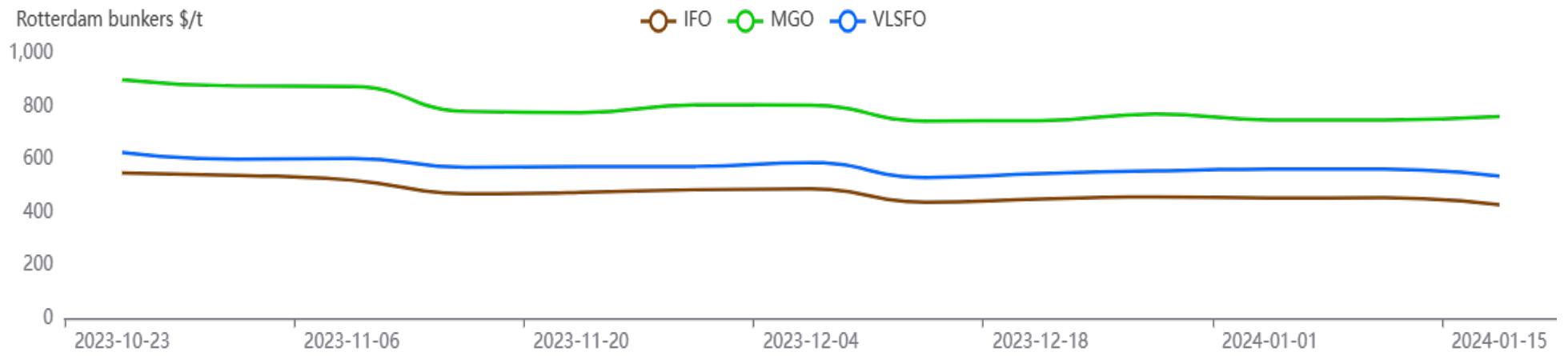
10TC	\$/day	WoW	
Jan-24	12,421.00	-71.0	-0.6 %
Feb-24	12,833.00	-30.0	-0.2 %
Mar-24	15,171.00	33.0	0.2 %
Q2 24	14,693.00	-92.0	-0.6 %
Q3 24	14,396.00	-87.0	-0.6 %
Q4 24	14,046.00	-25.0	-0.2 %
Q1 25	12,225.00	-75.0	-0.6 %
Q2 25	12,642.00	-30.0	-0.2 %
12,537.75	Cal 25	-41.25	-0.3 %
Cal 26	11,948.00	-46.0	-0.4 %
Cal 27	11,850.00	0.0	0.0 %



第六部分 燃油价格 BUNKER PRICE

MP	LO	HO	MO	SP	WoW	W%	M%
zhoushan	621.5	463.5	823.0	158.0	-25.0	-13.66	-3.66
Singapore	597.0	453.0	782.0	144.0	14.0	10.77	3.23
Rotterdam	537.5	429.5	762.5	108.0	0.0	0.0	12.5
Fujairah	600.0	418.0	906.0	182.0	-5.5	-2.93	2.82
Houston	591.5	472.5	803.5	119.0	42.5	55.56	91.94

(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		220.0	-2.0	-0.9	-2.22	-21.42
Maize		12.0	-215.0	-94.71	-94.74	-96.11
Soybeans		232.0	-14.0	-5.69	-10.08	-24.36
Rice		264.0	2.0	0.76	1.54	34.78
Barley		220.0	-1.0	-0.45	-1.79	-28.11
Energy		Index	+/-	Weekly	Monthly	YTD
Crude Oil	USD/Bbl	72.43	-0.52	-0.71	1.94	-4.41
Brent	USD/Bbl	77.87	0.16	0.21	2.19	-3.51
Natural Gas	USD/MMBtu	3.14	0.3	10.56	23.14	-19.28
Gasoline	USD/Gal	2.13	0.06	2.9	0.95	-8.19
Heating Oil	USD/Gal	2.67	0.06	2.3	2.3	-13.03
Ethanol	USD/Gal	1.58	0.0	0.0	-5.95	-28.83
Naphtha	USD/T	629.24	0.01	0.0	-0.11	3.01
Propane	USD/Gal	0.78	0.08	11.43	16.42	6.85
Uranium	USD/Lbs	92.5	1.5	1.65	12.39	89.16
Methanol	CNY/T	2399.0	6.0	0.25	0.08	-5.74
TTF Gas	EUR/MWh	30.28	-2.16	-6.66	-9.72	-57.35
UK Gas	GBP/thm	75.13	-6.67	-8.15	-10.34	-56.57
Industrial		Index	+/-	Weekly	Monthly	YTD
Copper	USD/Lbs	3.75	-0.03	-0.79	-2.85	-5.78
Coal	USD/T	130.85	-0.7	-0.53	-9.94	-67.29
Steel	CNY/T	3799.0	-44.0	-1.14	-1.61	-5.94
Iron Ore	USD/T	133.0	-8.5	-6.01	-2.92	12.24
Aluminum	USD/T	2208.0	-53.5	-2.37	-2.62	-3.81
Iron Ore Fe 62%	USD/T	2208.0	-53.5	-2.37	-2.62	-3.81
Metals		Index	+/-	Weekly	Monthly	YTD
Gold	USD/t.oz	2055.9	28.0	1.38	1.76	9.61
Silver	USD/t.oz	23.3	0.4	1.75	-2.51	-2.75
Platium	USD/t.oz	914.4	-39.0	-4.09	-3.19	-16.34
Currencies		Index	+/-	Weekly	Monthly	YTD
EUR/USD		1.1	0.01	0.92	0.92	2.8
USD/CNY		7.19	0.02	0.28	0.7	5.89

第八部分 本周话题 WEEKLY TOPIC



红海形势持续恶化

自从2023年11月19号胡塞武装在红海劫持了与以色列关联的滚装船“Galaxy Leader”以来，当前已经上升到胡塞武装的导弹开始袭击美国的船舶，以报复英美联军在1月12日以来针对胡塞武装目标进行的空中打击。随之带来的是苏伊士运河船舶通行明显减少，短期内海运形势将发生一定波动。

自2023年11月份以来，至少有20艘船舶在红海、亚丁湾和阿曼海遭到袭击。海上联合部队(CMF)警告所有船只在近几天内最好远离曼德海峡，而相关海事组织也发布了类似的指导。船舶战争险大幅度上升，1艘价值1亿美金的船舶如果要通过红海可能要支付100万美特战险保费，之前还是集装箱班轮公司宣布暂停红海航线，最近一些油轮船东和散货船东也启动暂停

红海通行的计划。不得已船东将改道以避免红海通行，改道航线(如经好望角或经巴拿马运河)，这通常会导致航程时间和成本大幅增加。从亚洲到北欧的航线如果通过好望角而不是苏伊士运河，其航程将增加大概3700海里水平，在正常运行速度下将多用10天时间。额外的距离影响运输成本和整体市场供需，短期市场难免会有波动。

红海北端是苏伊士运河，是连接地中海和亚洲最重要的运河，红海航道承载着约12%的全球海运贸易量，其中接近20%是通过集装箱运输。因为红海问题，开始时集装箱大范围选择绕航好望角，后来油轮、散货船等船型也参加到绕航的船队中。据hiFleet船队在线大数据显示，苏伊士运河的总体船舶通行数量目前减少一半，从原来每天70至100艘船舶的总通行数量下降到当前每天30至50艘的水平。从hiFleet红海绕航数据看集装箱船从印度洋和大西洋绕航好望角的船舶总数量已经超过280艘船舶。

因为集装箱船吨海里的增加，使得其运费也大幅度攀升，因为供需平衡的短期失衡，后来跟进绕航的油轮和散货船市场的租金水平也看到跟进上涨。长远来看，随着巴以战争的结束红海还是将最终归于平静。

Since the Houthis hijacked the Israeli-linked ro-ro Galaxy Leader in the Red Sea on November 19, 2023, the missiles that have now risen to the level of the Houthis have been attacking US ships in retaliation for air strikes against Houthi targets by the British and US coalition since January 12. As a result, shipping traffic in the Suez Canal has decreased significantly, and the shipping situation will fluctuate in the short term.

Since November 2023, at least 20 ships have been attacked in the Red Sea, Gulf of Aden and Sea of Oman. The Combined Maritime Force (CMF) has warned all ships to stay away from the Bab el-Mandeb Strait in the coming days, while relevant maritime organizations have issued similar guidance. A \$100 million ship may have to pay a \$1 million premium if it wants to pass through the Red Sea, after container liner companies announced the suspension of Red Sea routes, and recently some tanker owners and bulk cargo owners have also initiated plans to suspend Red Sea traffic. As a result, shippers will be diverted to avoid Red Sea traffic, rerouting routes (such as via the Cape of Good Hope or via the Panama Canal), often resulting in significant increases in journey time and costs. A route from Asia to Northern Europe that passes through the Cape of Good Hope instead of the Suez Canal would add about 3,700 nautical miles to its level and take 10 days longer at normal speed. The extra distance affects transportation costs and overall market supply and demand, and short-term market fluctuations are inevitable.

At the northern end of the Red Sea is the Suez Canal, the most important canal connecting the Mediterranean and Asia, and the Red Sea waterway carries about 12% of global seaborne trade, of which nearly 20% is transported by container. Due to the Red Sea problem, a large number of containers chose to sail around the Cape of Good Hope at the beginning, and later tankers, bulk carriers and other ship types also participated in the fleet. According to hiFleet's online big data, the overall number of ships passing through the Suez Canal has now fallen by half, from a total of 70 to 100 ships per day to the current level of 30 to 50 ships per day. From hiFleet Red Sea circumnavigation data, the total number of container ships sailing around the Cape of Good Hope from the Indian Ocean and the Atlantic Ocean has exceeded 280 ships.

Because of the increase in the tonnage nautical miles of container ships, the freight rate has also risen significantly, because of the short-term imbalance in the balance of supply and demand, and the rental level of the tanker and bulk carrier market has also seen a follow-up increase. In the long run, the Red Sea will eventually calm down with the end of the Israeli-Palestinian war.