



2024年 第5周市场周报

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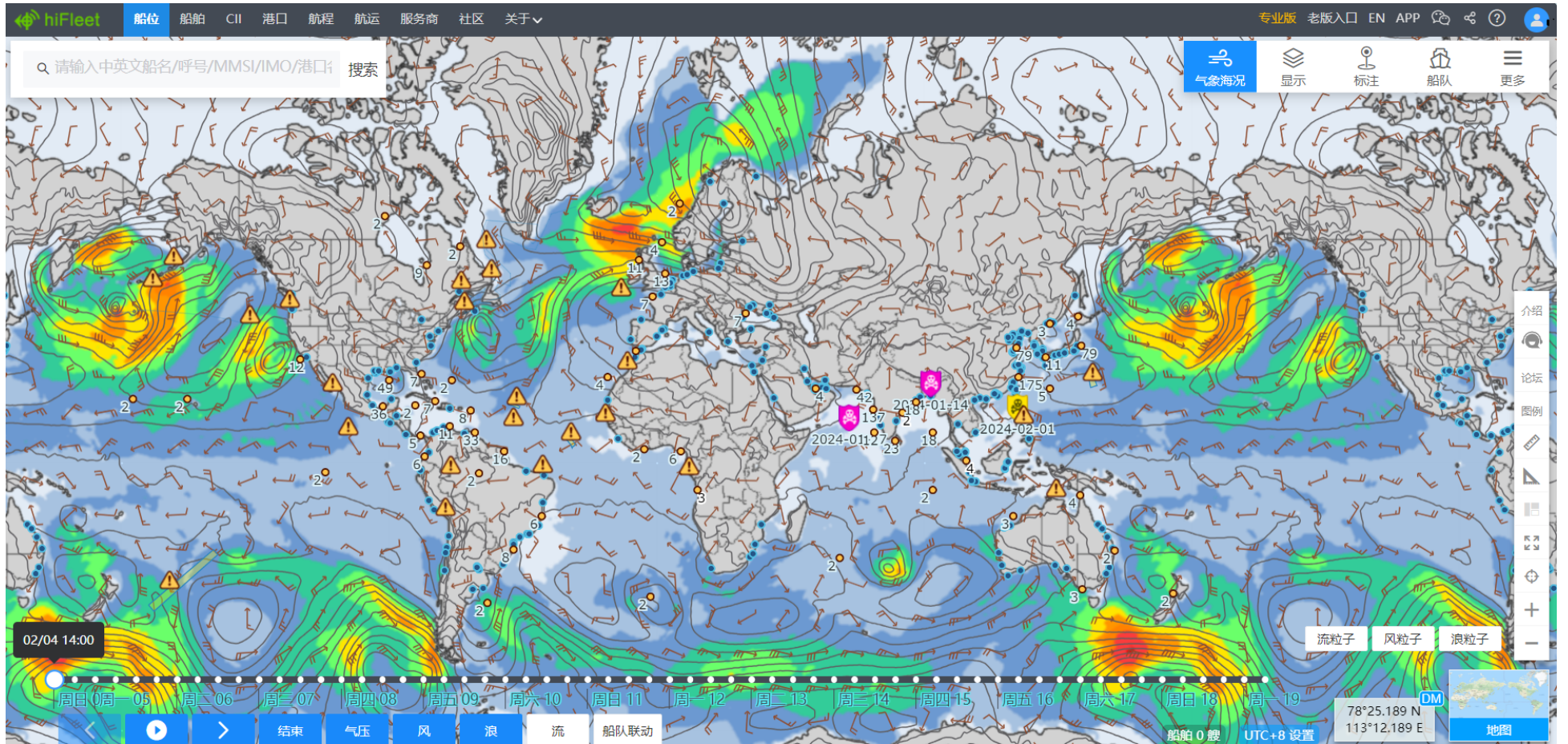
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本周话题 WEEKLY TOPIC

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944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 944 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2月1日菲律宾马尼拉湾安克雷奇锚地：五个人登上了一艘停泊的集装箱船，偷走了船上的货物并逃跑了。警报响起，消防水管启动，并进行了搜索。事件报告马尼拉VTMS。停泊后，菲律宾海岸警卫队上船检查。01.02.2024: 1640 UTC: Manila Bay Anchorage, Philippines. Five persons boarded an anchored container ship stole ship's stores and escaped. Alarm raised, fire hoses activated, and a search was carried out. Incident reported to VTMS Manila. Upon anchoring, the Philippines Coast Guard approached the ship for inspection.

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3米大浪；台湾海峡风力由7-8级，台湾海峡洋面海浪将经历4米巨浪，南海大部海域风力减弱在3-4级，有1米轻浪，南海部分地区有雾。辽东湾最大浮冰范围60-65海里；渤海湾、莱州湾最大浮冰范围5海里左右；黄海北部最大浮冰范围10-15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 rough. The wind in the Taiwan Strait may reach gale. The sea in the Taiwan Strait happens to experience very rough. In most of the South China Sea the wind are moderate with light sea and some areas may see fog. 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2月2号，一艘载有1.6万头牛羊的货船因担心在也门附近海域遭到袭击而从红海返航，在热浪中搁浅在澳大利亚的一个港口。澳大利亚出口商正试图将至少部分动物卸下进行检疫。According to hiFleet data, on the second of Feb, a ship carrying 16,000 sheep and cows that turned back from the Red Sea due to the risk of attack off Yemen was stranded at an Australian port in a heatwave as the exporter sought to offload at least some of the animals into quarantine.

备注 Remark

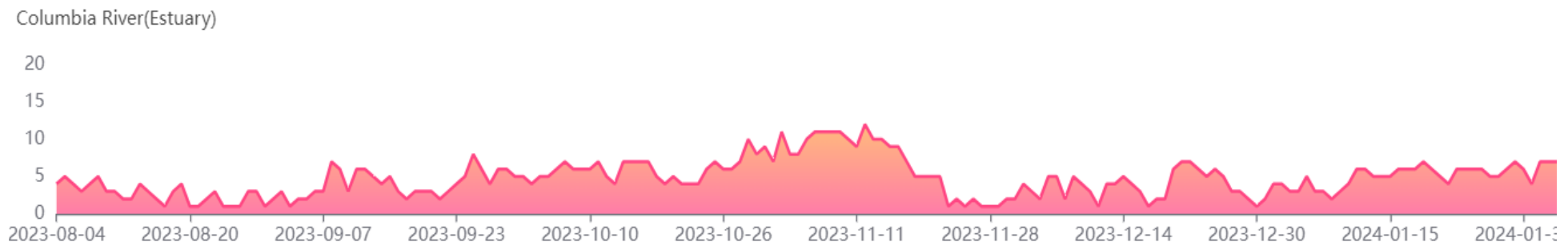
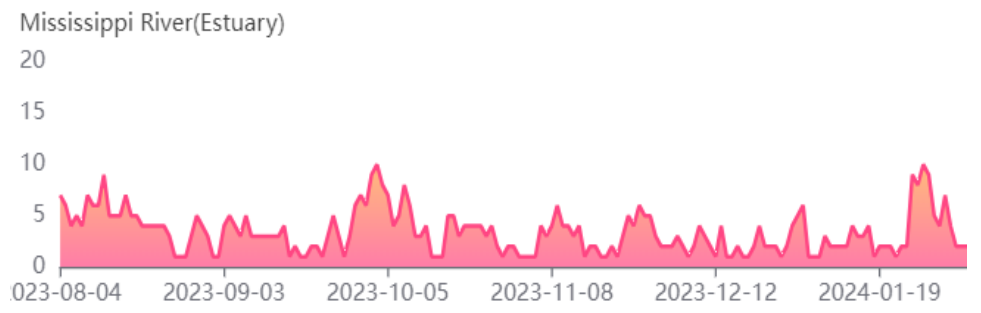
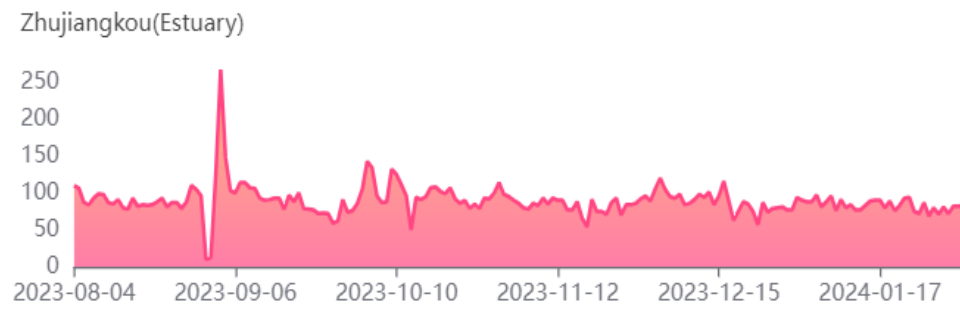
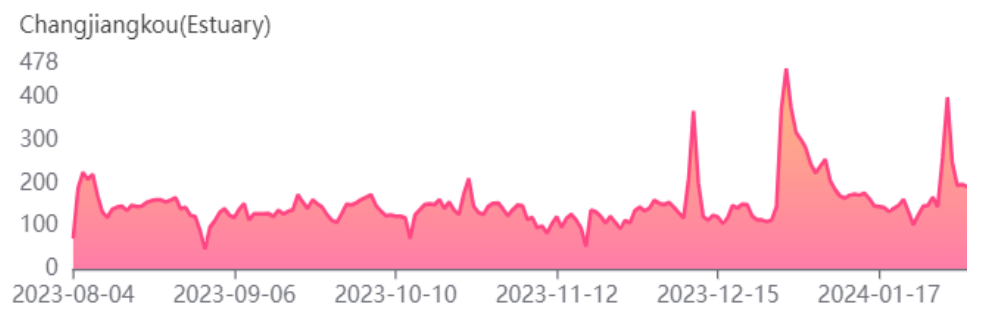
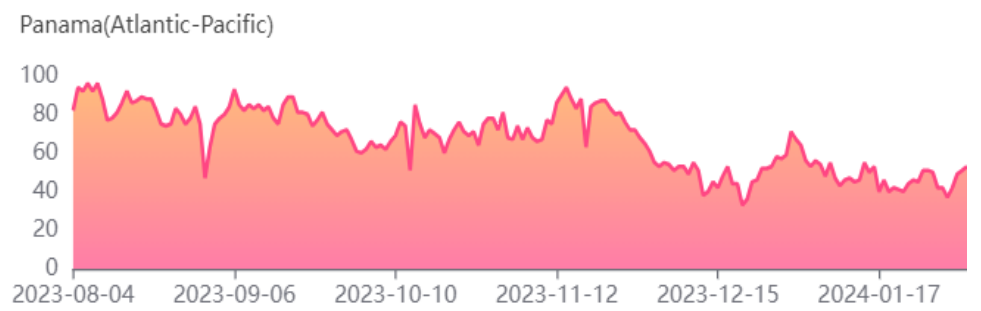
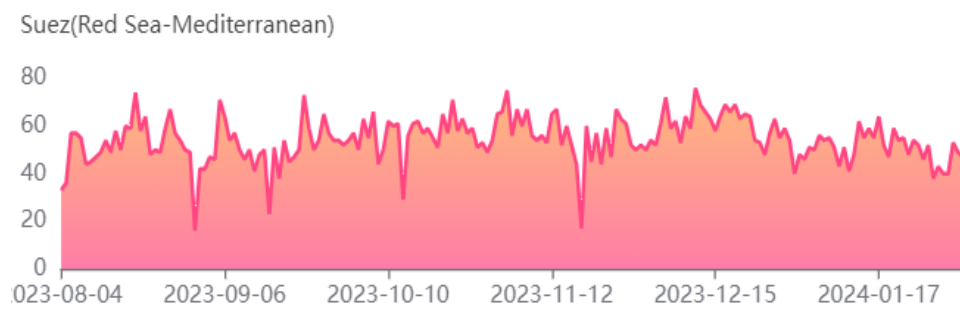
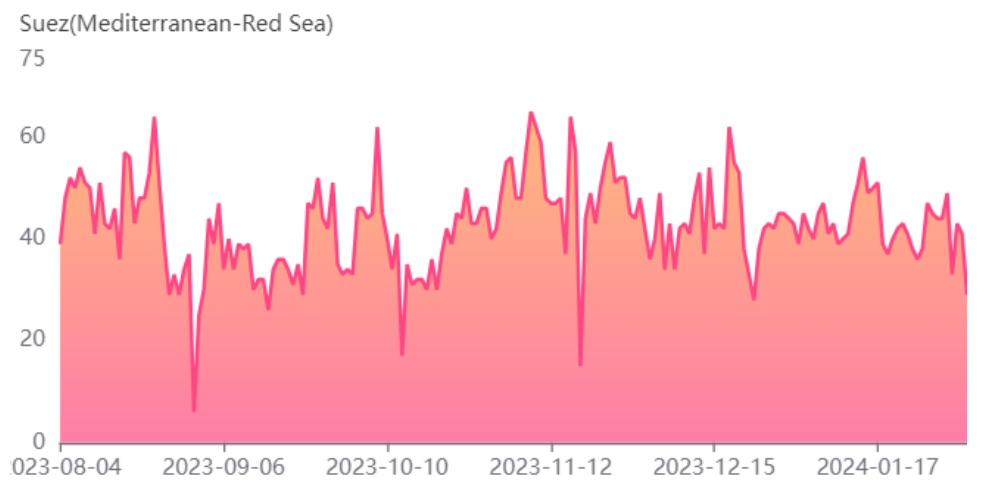
本报告数据截止时间为2024年2月4日北京时间17点；所有数据和或观点仅供参考，在任何情况下本公司及其员工不承担任何风险。The data deadline for this report is Beijing time 17 hours on Feb 4 of 2024; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

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	45	1458	-44	-236
Miss.Riv.	2	96	-8	44
CJK	192	5065	671	-814
Pa.Atlan.	53	1339	-2	-136
Colum.Riv.	7	157	6	50
Suez.Med.	29	1237	-2	-33
Pa.Pac.	40	1425	-9	-360
ZJK	67	2369	-35	-121

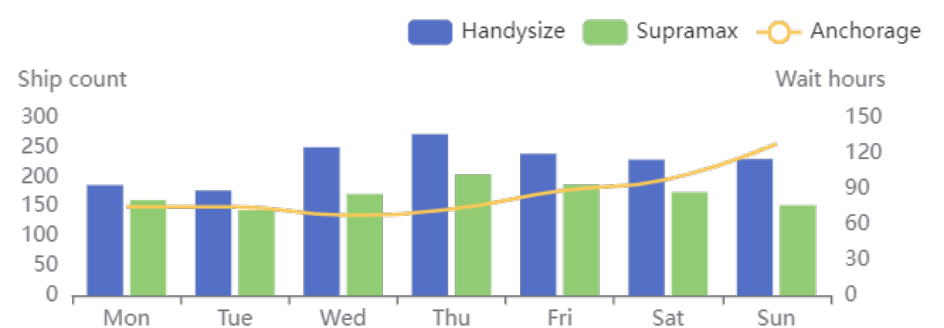


(P.N.-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

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

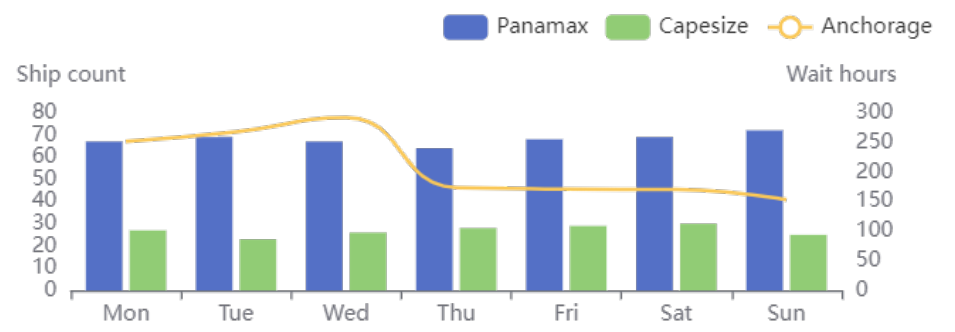
Type	M	T	W	Th	F	Sat	Sun
HDY	186	177	250	272	239	229	230
SMX	161	144	171	204	187	174	152
WT.h.	74.6	74.8	67.8	72.9	88.2	98.1	128



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

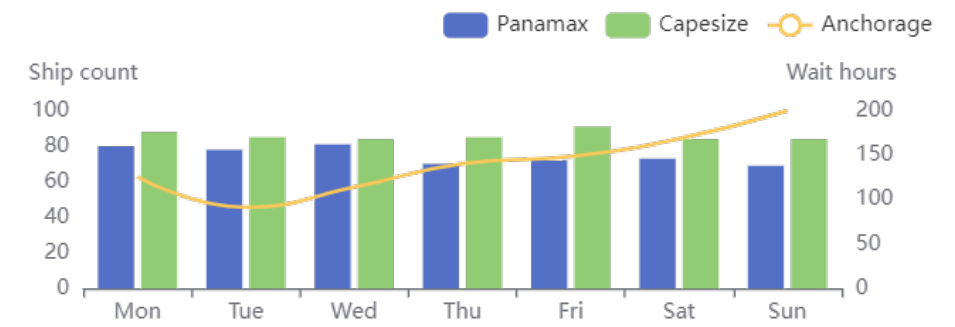
Type	M	T	W	Th	F	Sat	Sun
Pan.	67	69	67	64	68	69	72
Cap	27	23	26	28	29	30	25
WT.h.	251.3	267.6	291.6	173.5	171	170.3	153



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

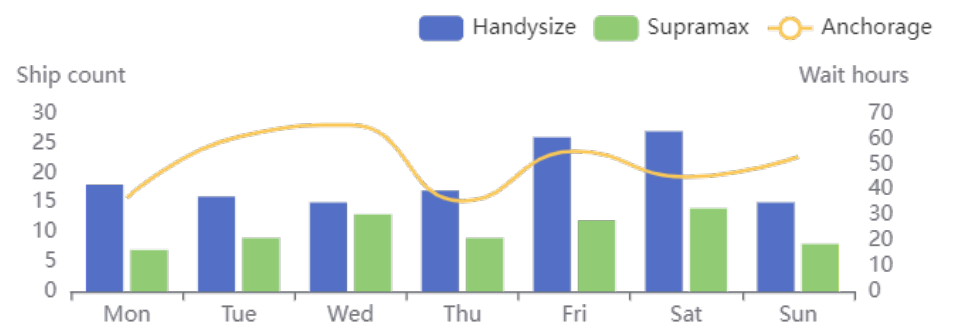
Type	M	T	W	Th	F	Sat	Sun
Pan.	80	78	81	70	72	73	69
Cap	88	85	84	85	91	84	84
WT.h.	125.55	91.4	113.9	140.4	148.5	168.4	200



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

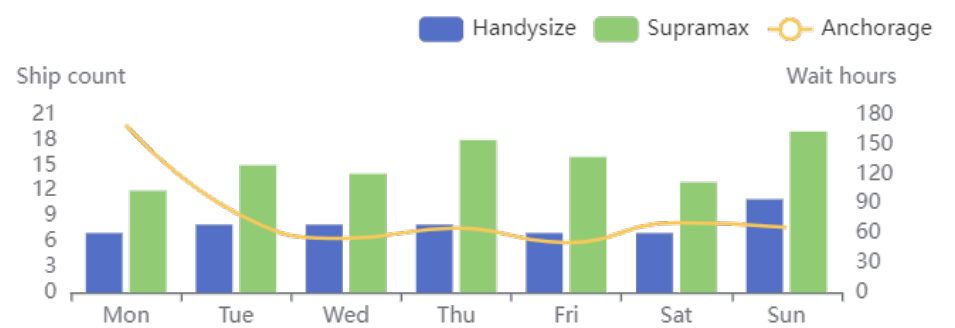
Type	M	T	W	Th	F	Sat	Sun
HDY	18	16	15	17	26	27	15
SMX	7	9	13	9	12	14	8
WT.h.	36.9	60.9	65.55	35.6	55.2	45.1	53



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

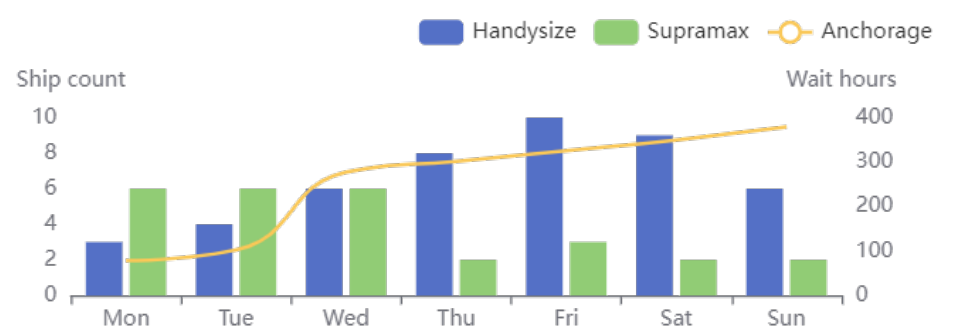
Type	M	T	W	Th	F	Sat	Sun
HDY	7	8	8	8	7	7	11
SMX	12	15	14	18	16	13	19
WT.h.	169.6	80.6	54.7	65.2	50.5	70.5	66



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

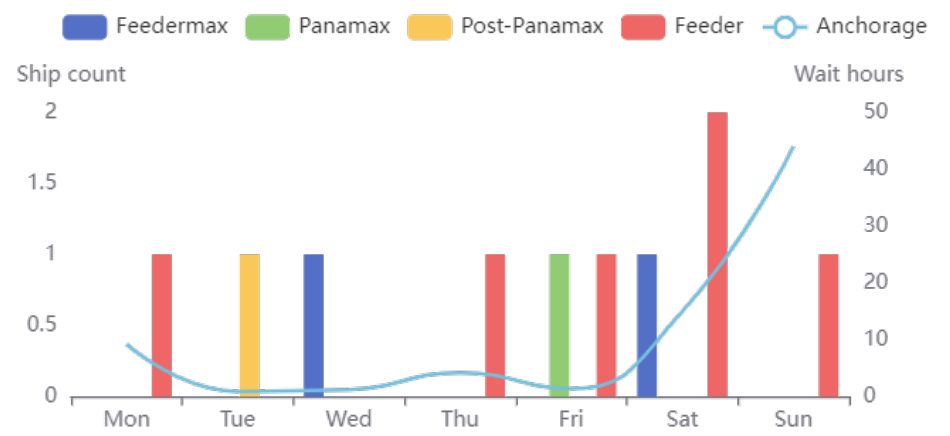
Type	M	T	W	Th	F	Sat	Sun
HDY	3	4	6	8	10	9	6
SMX	6	6	6	2	3	2	2
WT.h.	78.2	102.2	277.4	301.4	325.4	349.4	379



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

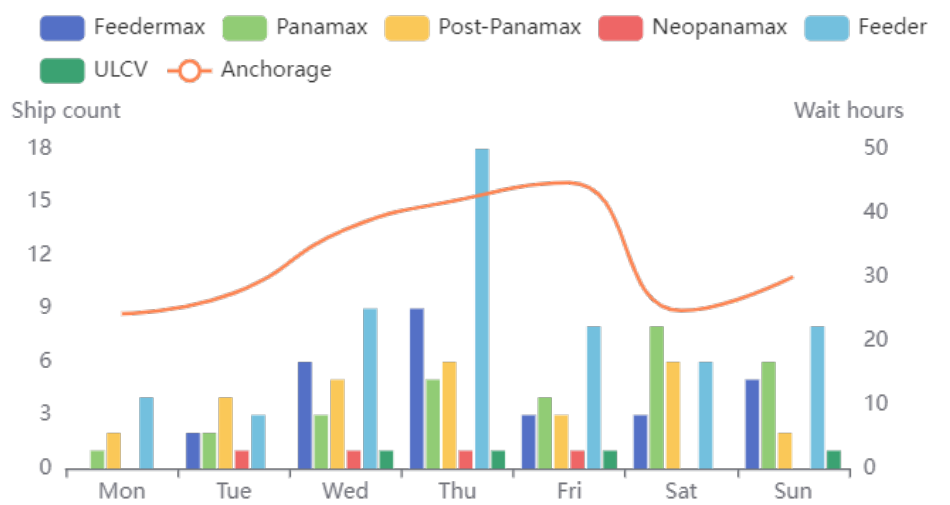
Type	M	T	W	Th	F	Sat	Sun
F.ma.	0	0	1	0	0	1	0
Pan.	0	0	0	0	1	0	0
PPx	0	1	0	0	0	0	0
NPx	0	0	0	0	0	0	0
Fd	1	0	0	1	1	2	1
WT.h.	9.2	0.9	1.2	4.2	1.35	15	44
UlcV	0	0	0	0	0	0	0



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

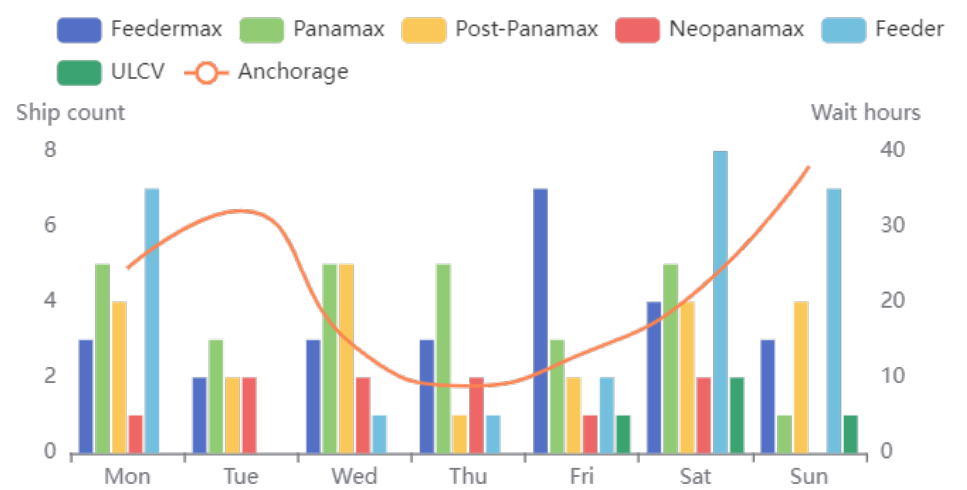
Type	M	T	W	Th	F	Sat	Sun
F.ma.	0	2	6	9	3	3	5
Pan.	1	2	3	5	4	8	6
PPx	2	4	5	6	3	6	2
NPx	0	1	1	1	1	0	0
Fd	4	3	9	18	8	6	8
UlcV	0	0	1	1	1	0	1
WT.h.	24.2	27.45	37.4	42	44.7	24.7	30



最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

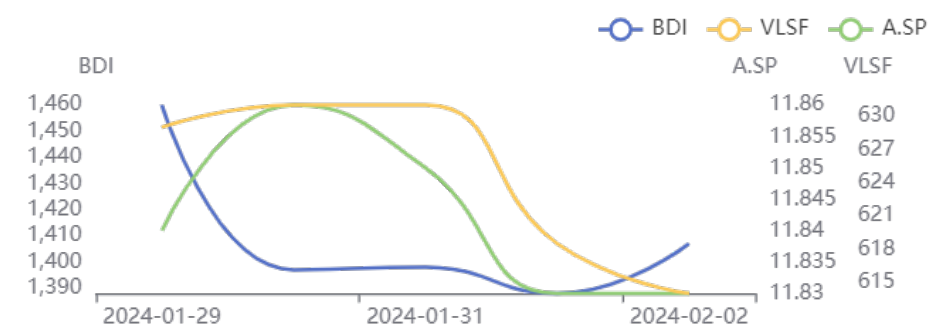
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

Type	M	T	W	Th	F	Sat	Sun
F.ma.	3	2	3	3	7	4	3
Pan.	5	3	5	5	3	5	1
PPx	4	2	5	1	2	4	4
NPx	1	2	2	2	1	2	0
Fd	7	0	1	1	2	8	7
UlcV	0	0	0	0	1	2	1
WT.h.	24.5	32.1	14.1	8.9	13.15	21.3	38



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

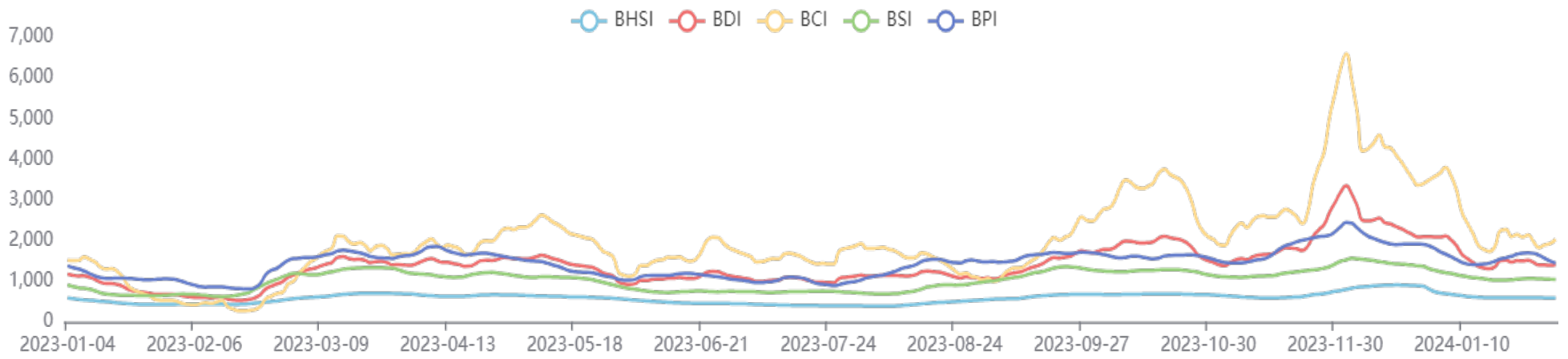
Type	M	T	W	Th	F	Sat	Sun
BDI	1689	1636	1566	1497	1444		
VLSF	629.00	631.00	631.00	618.50	614.00		
A.SP	11.84	11.86	11.85	11.83	11.83	11.85	



第三部分 航运市场 SHIPPING MARKET

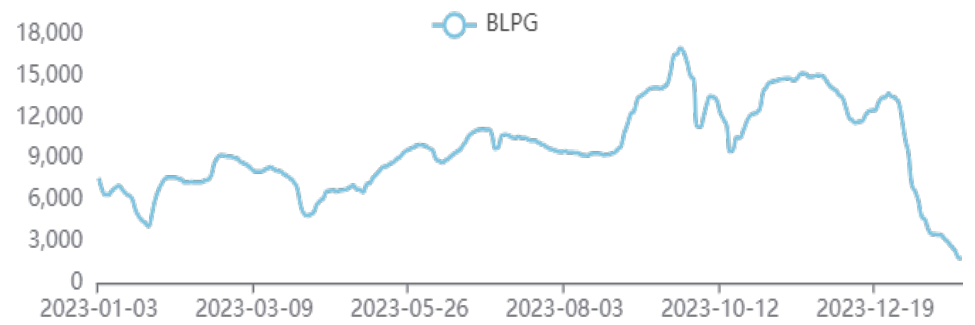
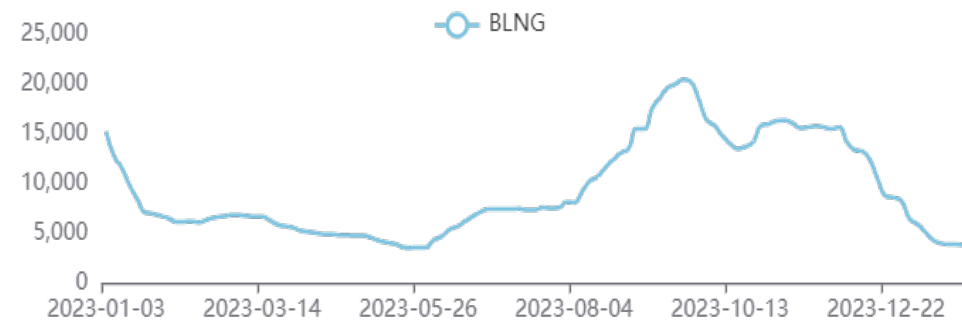
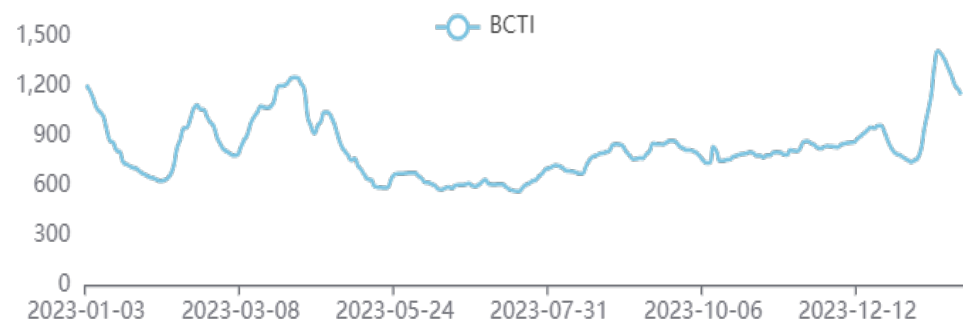
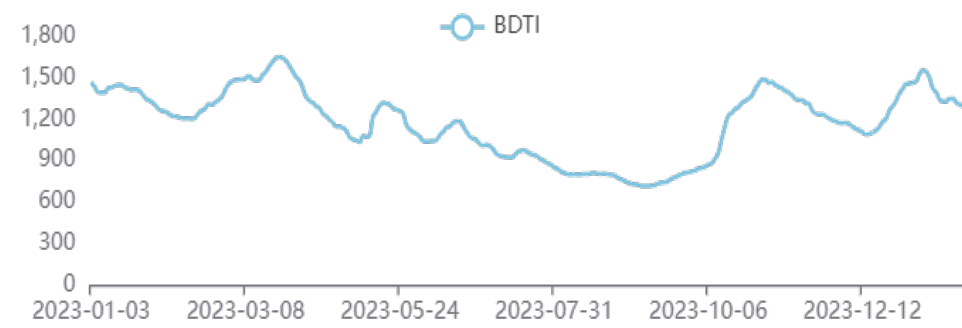
波罗的海干散货指数Baltic Dry Index

Type	PI	WoW	W%	M%	y%
BDI	1407	-111.0	-7.31	-33.32	119.84
BCI	2030	-105.0	-4.92	-46.55	356.18
BPI	1444	-252.0	-14.86	-13.33	46.15
BSI	1041	-24.0	-2.25	-14.11	52.19
BHSI	585	-11.0	-1.85	-15.83	34.17

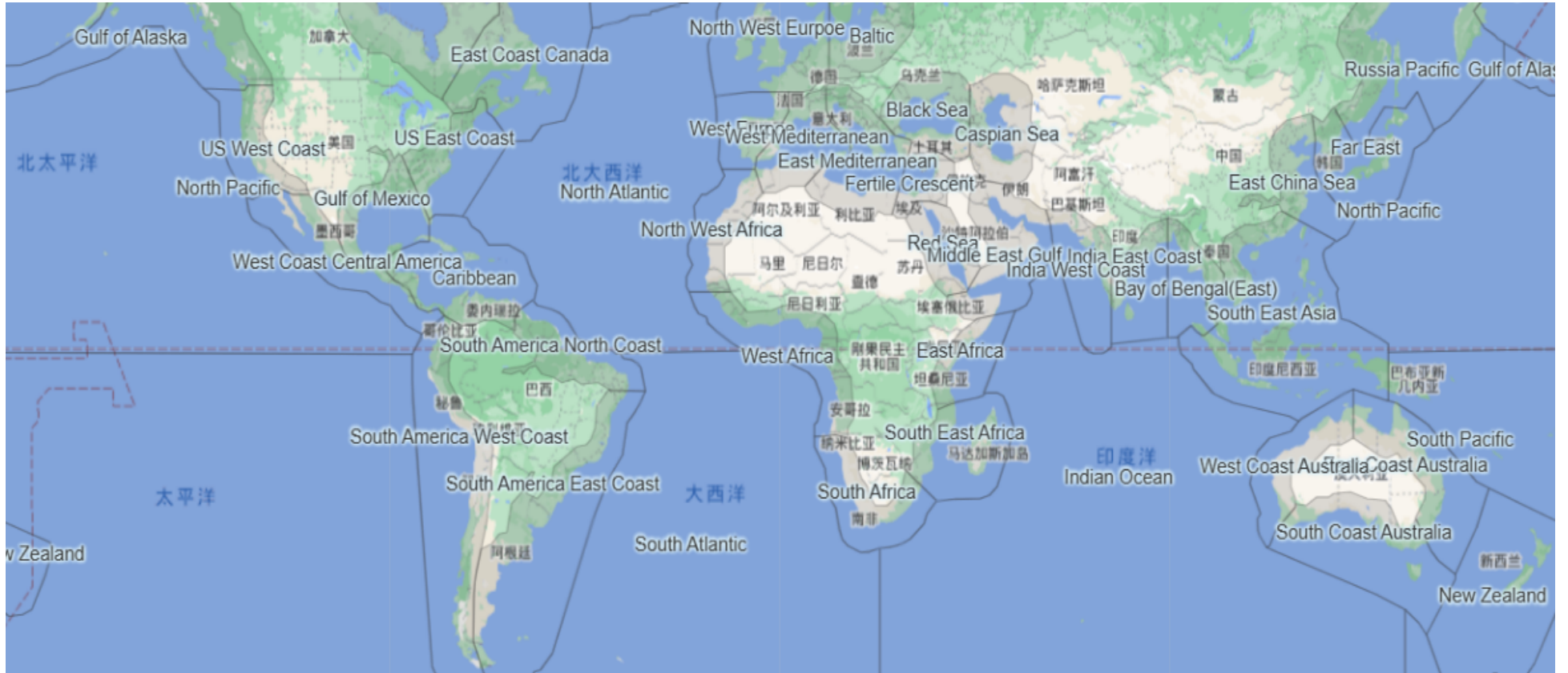


能源运价指数Energy Shipping Index

Type	PI	WoW	W%	M%	y%
BDTI	1287	-60.0	-4.45	-7.01	2.47
BCTI	1147	-211.0	-15.54	43.55	83.23
BLNG	3788	-75.0	-1.94	-53.84	-38.23
BLPG	1762	-1413.0	-44.5	-86.84	-76.96



第四部分 运力分布 SUPPLY DISTRIBUTION

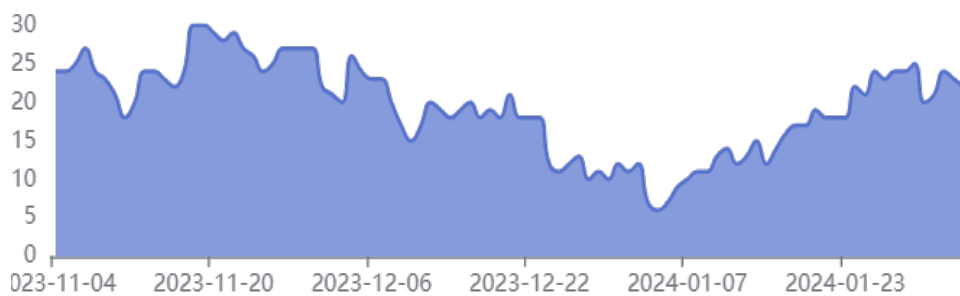


好望角型散货船 Capesize

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.

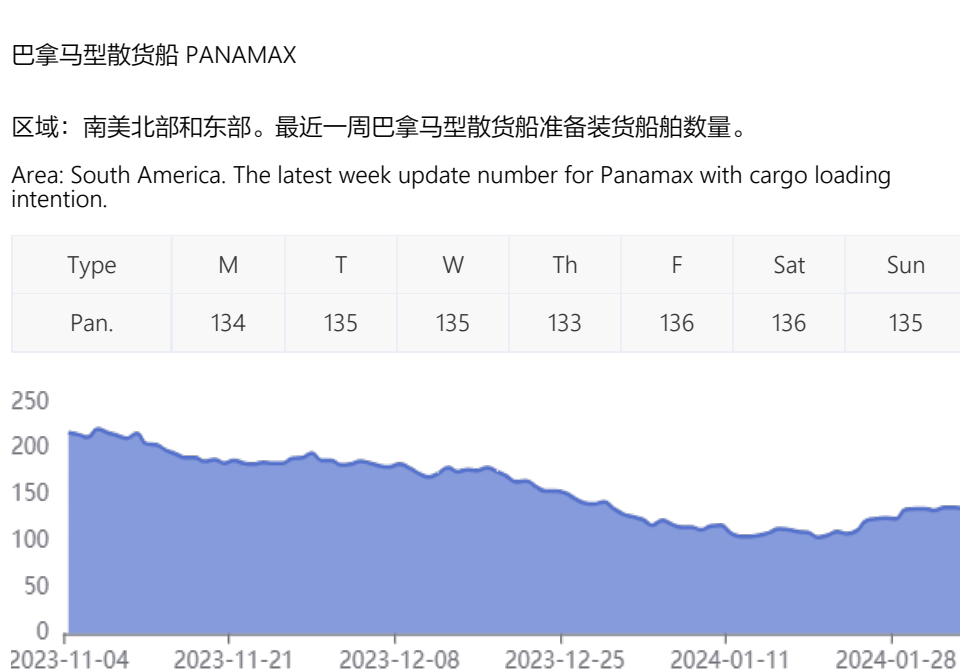
Type	M	T	W	Th	F	Sat	Sun
Cape	24	25	20	21	24	23	22



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	24	23	26	29	29	27	32

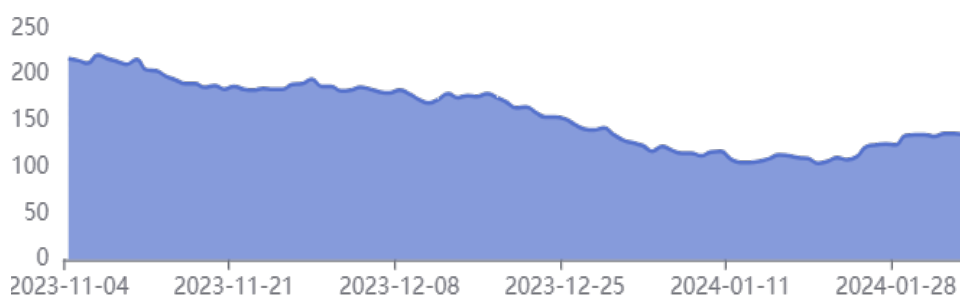


巴拿马型散货船 PANAMAX

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.

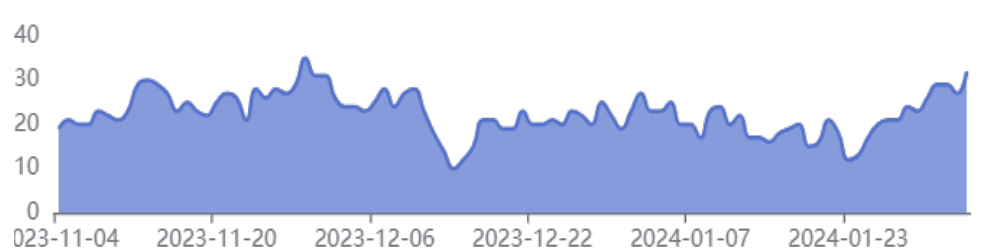
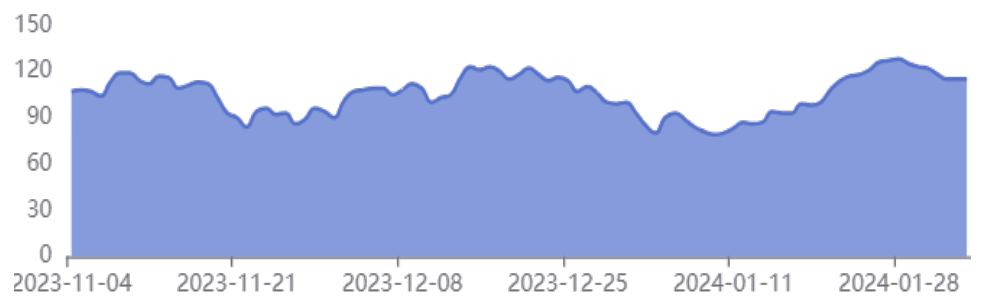
Type	M	T	W	Th	F	Sat	Sun
Pan.	134	135	135	133	136	136	135



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.

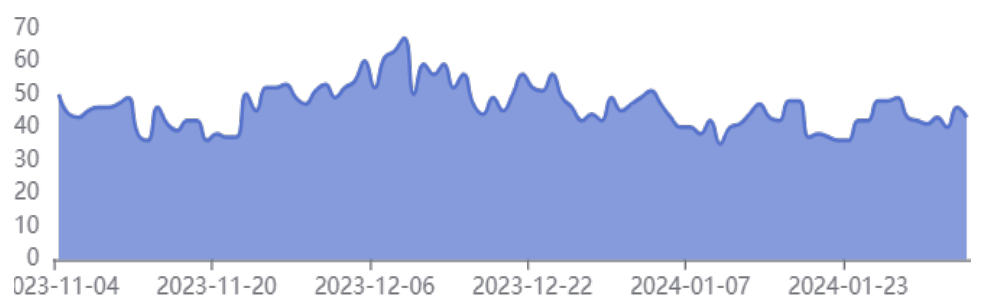
Type	M	T	W	Th	F	Sat	Sun
Cape	125	123	122	118	115	115	115



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.

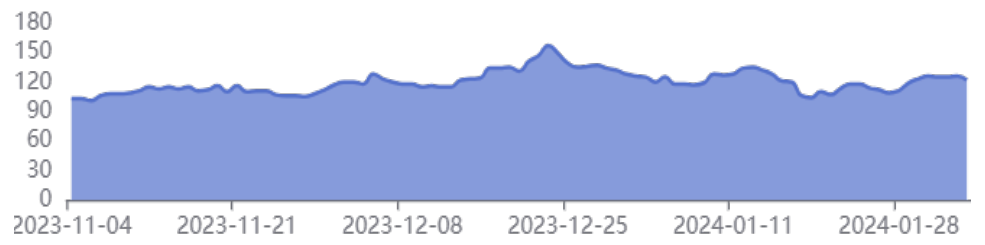
Type	M	T	W	Th	F	Sat	Sun
Pan.	42	52	47	49	44	45	46



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.	119	123	126	125	125	126	122

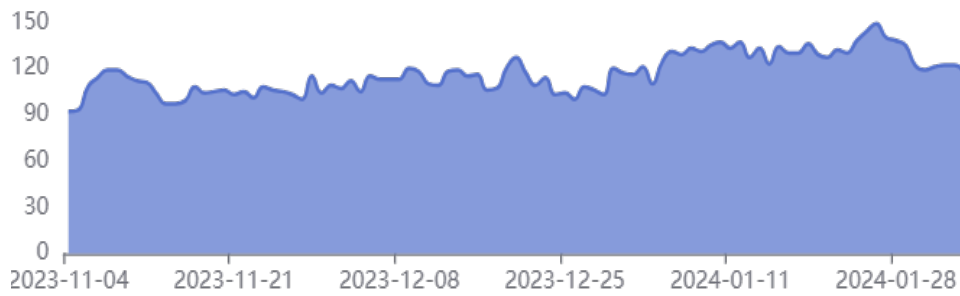


超大灵便型散货 SUPRAMAX

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.

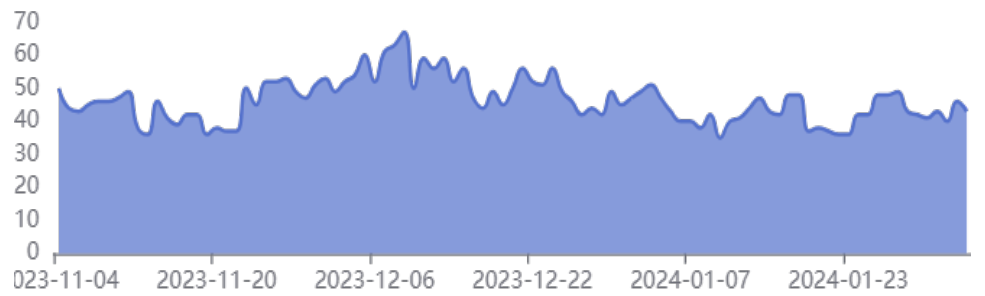
Type	M	T	W	Th	F	Sat	Sun
SMX	135	122	119	121	122	122	118



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.

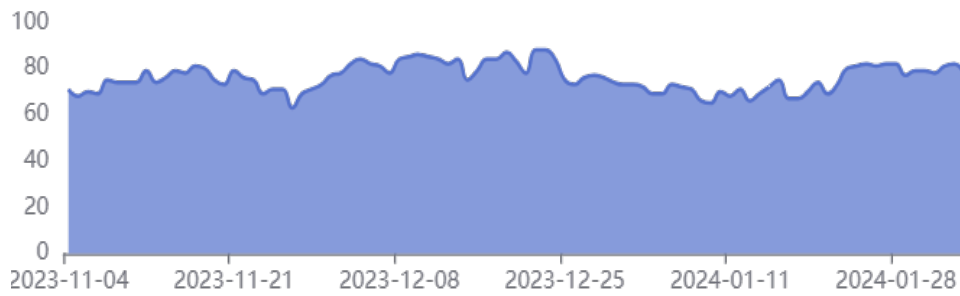
Type	M	T	W	Th	F	Sat	Sun
SMX	43	42	41	43	40	46	43



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.

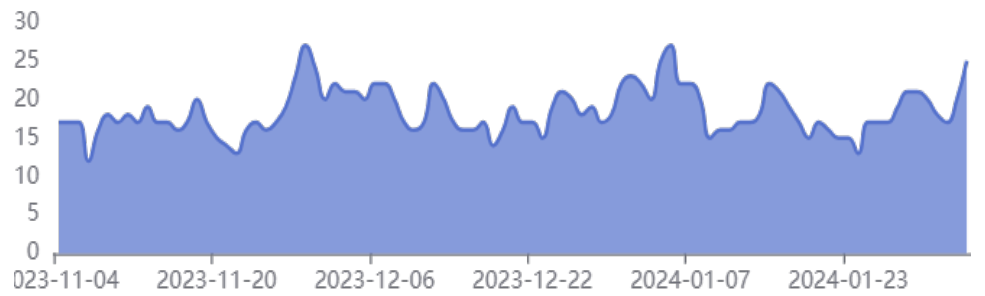
Type	M	T	W	Th	F	Sat	Sun
SMX	21	21	20	18	17	20	25



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.

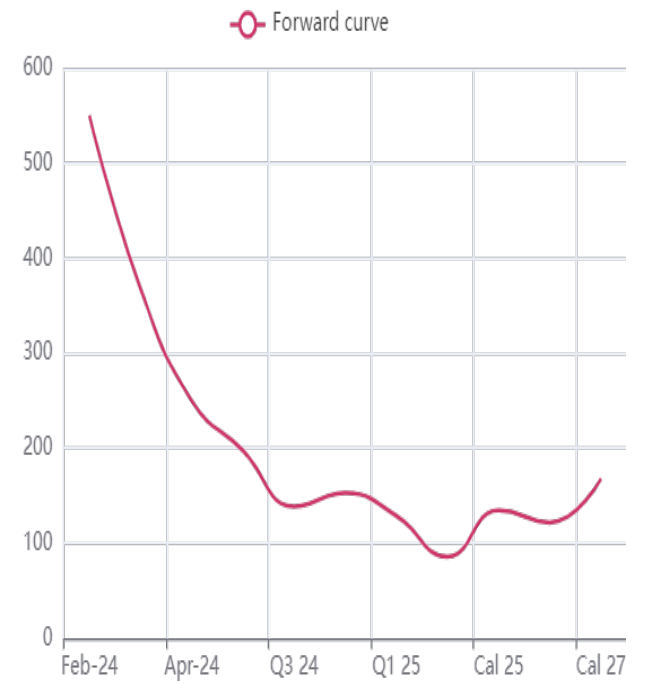
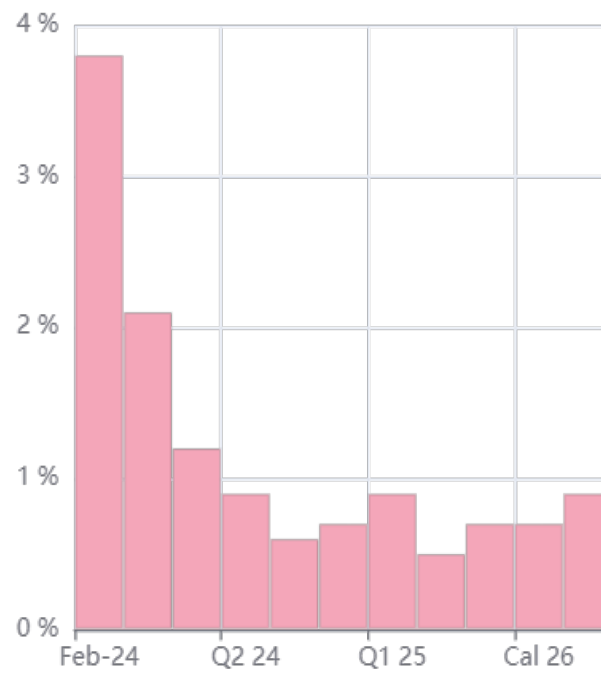
Type	M	T	W	Th	F	Sat	Sun
SMX	77	79	79	78	81	82	78



第五部分 远期运价协议 FFA

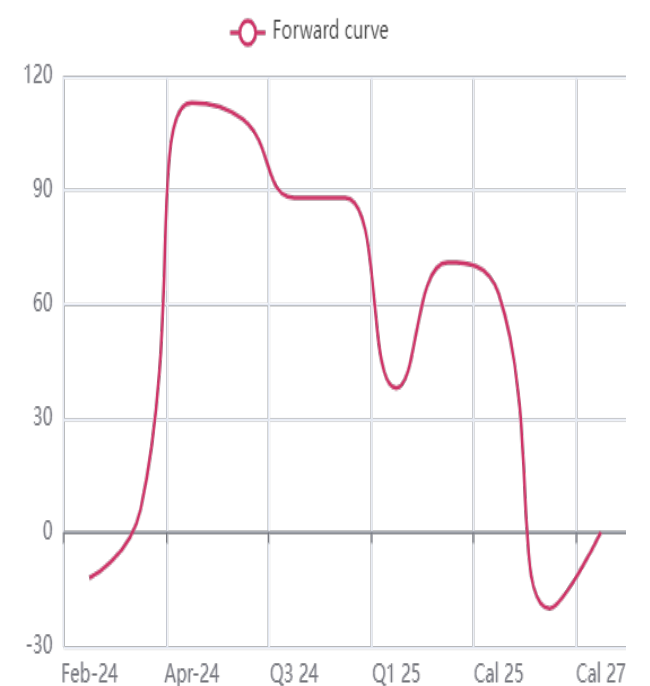
好望角型散货船Capesize

STC	\$/day	WoW	
Feb-24	15,171.00	550.0	3.8 %
Mar-24	18,000.00	368.0	2.1 %
Apr-24	20,721.00	250.0	1.2 %
Q2 24	21,526.00	197.67	0.9 %
Q3 24	22,475.00	139.0	0.6 %
Q4 24	22,957.00	153.0	0.7 %
Q1 25	14,329.00	129.0	0.9 %
Q2 25	18,057.00	86.0	0.5 %
Cal 25	18,839.00	135.0	0.7 %
Cal 26	18,693.00	122.0	0.7 %
Cal 27	18,179.00	168.0	0.9 %



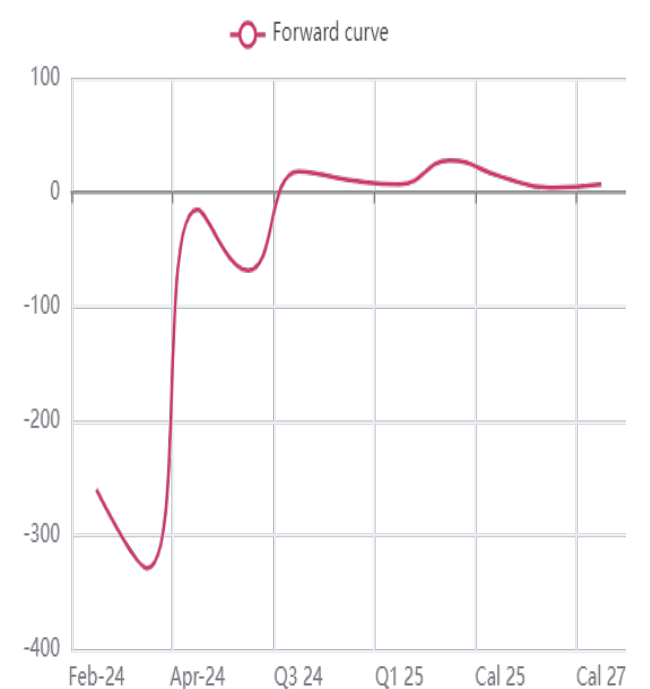
灵便型散货船Handysize

7TC	\$/day	WoW	
Feb-24	11,363.00	-12.0	-0.1 %
Mar-24	13,394.00	6.0	0.0 %
Apr-24	13,788.00	113.0	0.8 %
Q2 24	13,667.00	108.67	0.8 %
Q3 24	13,362.67	88.0	0.7 %
Q4 24	13,113.00	88.0	0.7 %
Q1 25	11,788.00	38.0	0.3 %
Q2 25	12,021.00	71.0	0.6 %
Cal 25	11,962.75	62.75	0.5 %
Cal 26	11,638.00	-20.0	-0.2 %
Cal 27	11,525.00	0.0	0.0 %



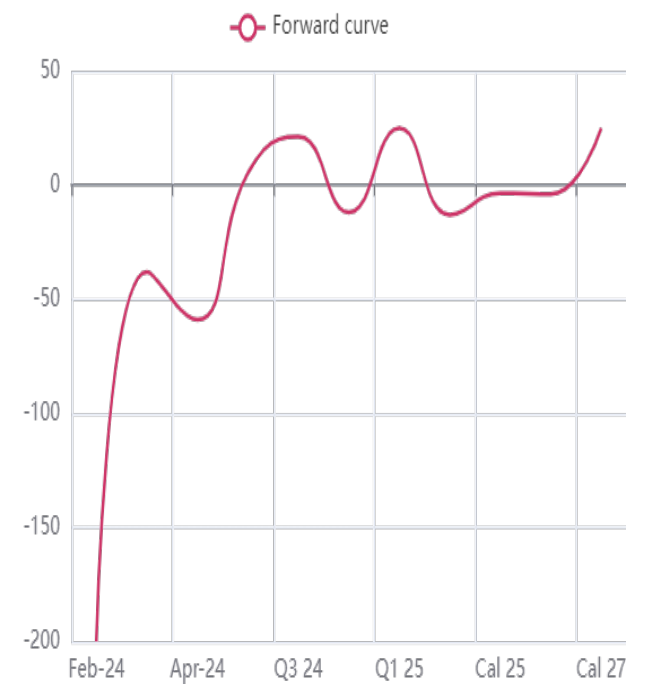
巴拿马型散货船Panamax

4TC	\$/day	WoW	
Feb-24	11,879.00	-260.0	-2.1 %
Mar-24	14,564.00	-329.0	-2.2 %
Apr-24	15,621.00	-15.0	-0.1 %
Q2 24	15,502.00	-68.33	-0.4 %
Q3 24	14,461.33	18.33	0.1 %
Q4 24	14,243.00	11.0	0.1 %
Q1 25	12,371.00	7.0	0.1 %
Q2 25	13,371.00	28.0	0.2 %
Cal 25	12,850.00	14.0	0.1 %
Cal 26	12,143.00	4.0	0.0 %
Cal 27	11,975.00	7.0	0.1 %



超大灵便型散货船Supramax

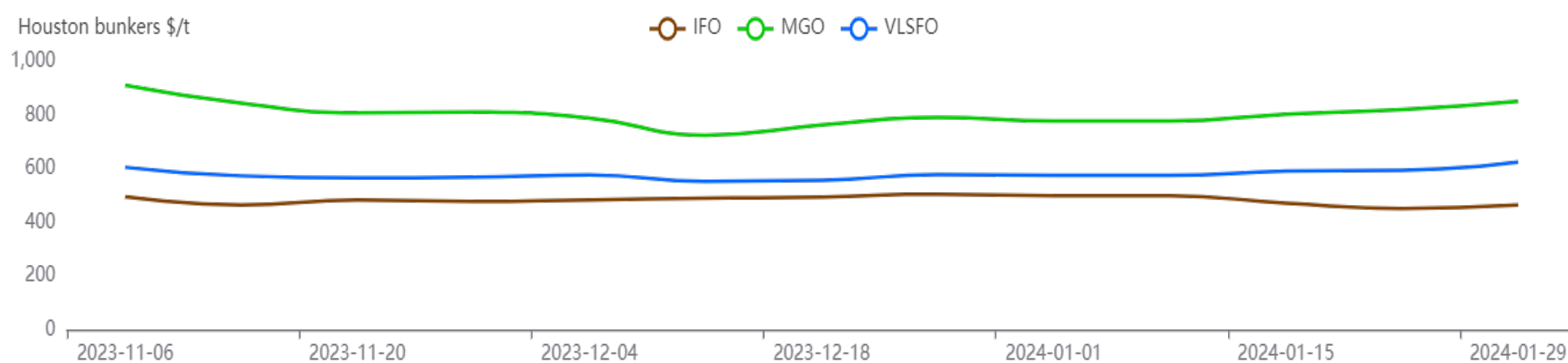
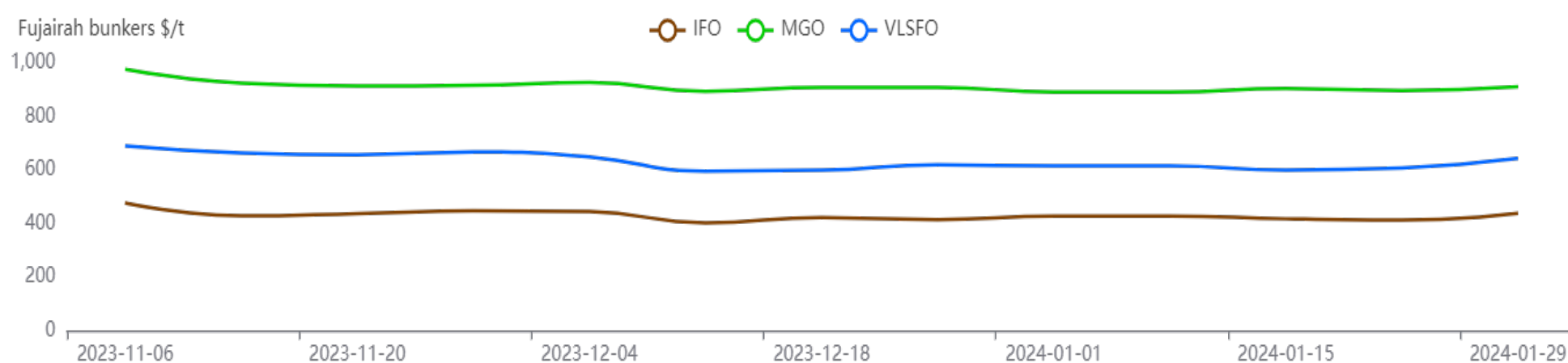
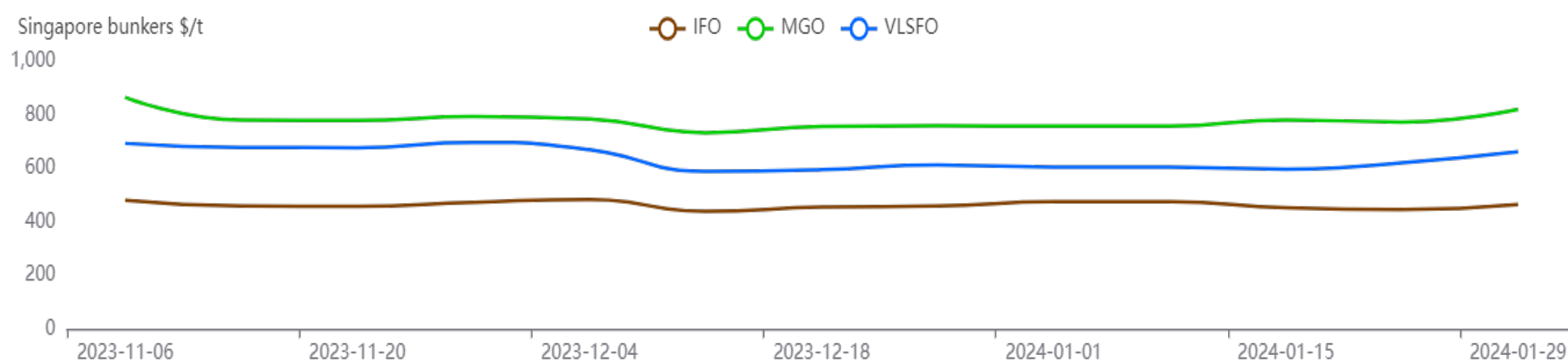
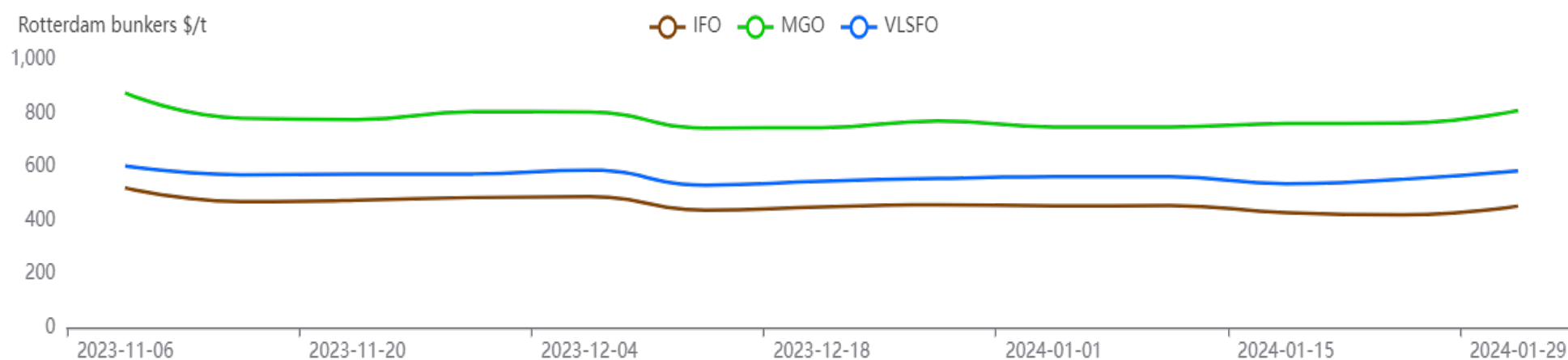
10TC	\$/day	WoW	
Feb-24	11,946.00	-200.0	-1.6 %
Mar-24	14,625.00	-38.0	-0.3 %
Apr-24	15,083.00	-59.0	-0.4 %
Q2 24	14,933.33	5.33	0.0 %
Q3 24	14,163.00	21.33	0.2 %
Q4 24	14,063.00	-12.0	-0.1 %
Q1 25	12,342.00	25.0	0.2 %
Q2 25	12,625.00	-13.0	-0.1 %
12,554.25	Cal 25	-3.5	0.0 %
Cal 26	12,079.00	-4.0	0.0 %
Cal 27	11,958.00	25.0	0.2 %



第六部分 燃油价格 BUNKER PRICE

MP	LO	HO	MO	SP	WoW	W%	M%
zhoushan	670.0	480.0	847.0	190.0	6.0	3.26	3.83
Singapore	662.5	465.5	821.5	197.0	22.5	12.89	51.54
Rotterdam	585.0	454.0	811.0	131.0	-2.0	-1.5	20.74
Fujairah	644.0	439.0	912.5	205.0	9.5	4.86	9.33
Houston	625.0	465.0	852.0	160.0	17.5	12.28	109.15

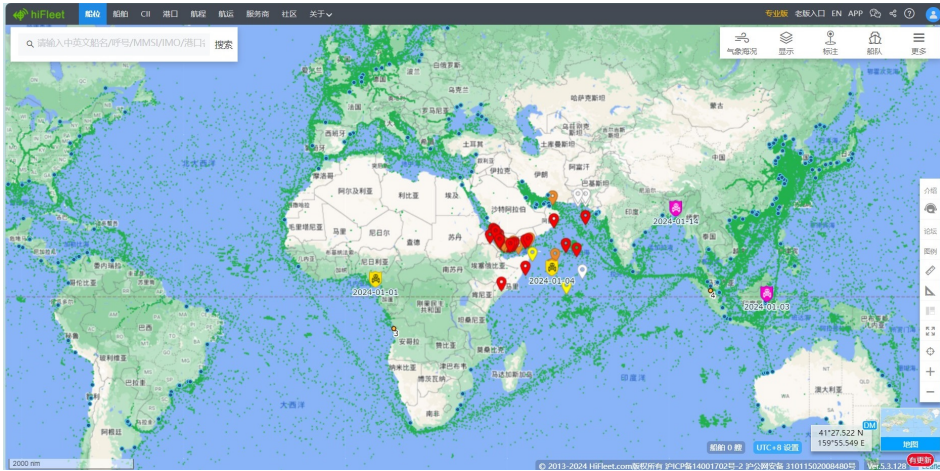
(MP-Bunkering Main Ports; LO-Heavy Low Sulphur Fuel Oil; HO-Heavy High Sulphur Fuel Oil; MO-MGO; SP-Spread;)



第七部分 最新商品价格 LATEST COMMODITIES PRICE

Grains and Oilseeds		Index	+/-	Weekly	Monthly	YTD
Wheat		218.0	-2.0	-0.91	-3.11	-21.82
Maize		209.0	-4.0	-1.88	-9.52	-32.75
Soybeans		221.0	-4.0	-1.78	-14.01	-27.03
Rice		266.0	0.0	0.0	1.92	32.16
Barley		219.0	0.0	0.0	-1.79	-27.01
Energy		Index	+/-	Weekly	Monthly	YTD
Crude Oil	USD/Bbl	77.94	4.52	6.16	3.81	-4.68
Brent	USD/Bbl	82.86	4.11	5.22	2.56	-5.93
Natural Gas	USD/MMBtu	2.13	-0.25	-10.5	-15.48	-37.9
Gasoline	USD/Gal	2.29	0.12	5.53	6.02	-13.26
Heating Oil	USD/Gal	2.85	0.18	6.74	6.74	-18.57
Ethanol	USD/Gal	1.59	0.01	0.63	-4.79	-28.05
Naphtha	USD/T	640.84	14.01	2.24	0.7	-7.86
Propane	USD/Gal	0.8	0.0	0.0	19.4	-4.76
Uranium	USD/Lbs	106.0	0.0	0.0	16.48	117.21
Methanol	CNY/T	2505.0	74.0	3.04	2.58	-8.34
TTF Gas	EUR/MWh	28.8	1.75	6.47	-14.92	-54.49
UK Gas	GBP/thm	71.39	4.92	7.4	-21.29	-55.72
Industrial		Index	+/-	Weekly	Monthly	YTD
Copper	USD/Lbs	3.84	0.07	1.86	-1.54	-10.07
Coal	USD/T	127.1	-0.9	-0.7	-12.65	-63.79
Steel	CNY/T	3952.0	76.0	1.96	-0.1	-4.19
Iron Ore	USD/T	137.5	5.0	3.77	-3.51	10.44
Aluminum	USD/T	2244.0	74.5	3.43	-4.51	-14.77
Iron Ore Fe 62%	USD/T	2244.0	74.5	3.43	-4.51	-14.77
Metals		Index	+/-	Weekly	Monthly	YTD
Gold	USD/t.oz	2028.0	4.5	0.22	-1.9	5.15
Silver	USD/t.oz	22.9	0.7	3.15	-4.82	-3.78
Platium	USD/t.oz	907.4	12.7	1.42	-6.67	-13.22
Currencies		Index	+/-	Weekly	Monthly	YTD
EUR/USD		1.08	-0.01	-0.92	-2.7	-0.92
USD/CNY		7.19	-0.01	-0.14	0.56	6.2

第八部分 本周话题 WEEKLY TOPIC



航运的厄尔尼诺

这里航运的厄尔尼诺蕴含着两层含义，一层是自然的厄尔尼诺对航运的影响，另外更深层次的航运厄尔尼诺是局部区域的政治经济和军事冲突对航运的影响。

2023年海运市场在能源方面的船东都获得不错的收益，干散货运输市场先抑后扬，集装箱市场总体运力还是过剩，虽然年末因为红海危机使得集装箱市场有大幅度攀升。

2023年间巴拿马运河因为厄尔尼诺原因引起的干旱导致了船舶通行的受限，引发了一些船舶的绕航；第四季度的红海危机导致大批船舶绕航好望角；因为俄乌冲突对俄罗斯的制裁导致俄罗斯油品的出口远渡重洋。这些都无疑增加了世界范围内的海运吨海里，这是2023年间海运市场最显著的特征之一。

海运吨海里统计数据既考虑了贸易量，也考虑了货运对应的距离，为整体海运变化情况提供了更好的指标。据hiFleet航运大数据统计，2023年间总体海运吨海里增长接近5.0%的水平，世界范围的贸易量因为中国总体需求的减弱其增长在2.5%的水平，可见船舶的绕航或者贸易的远行对海运的整体影响在2023年格外显眼。

2023年间不同领域的海运吨海里对其市场的影响显而易见，在石油产品、液化石油气和原油中表现得最为突出。俄乌冲突的影响导致的贸易转移是显而易见的，俄罗斯的石油经过更长的距离向东，而欧洲的进口反而从更远的印度洋而来，美国对亚洲的长途出口也增长显著，汽车的出口从远东到欧洲也出现了海运吨海里的增长，干散货的吨海里总体增长最少。贸易模式的重大转变不会经常重复，但海运贸易的日益复杂是航运业日益重要的趋势，HiFleet每天都在时时监控全球船舶动态和运力分布变化情况，我们衷心希望平台能够为航运的战略发展做出贡献。

The shipping El Nino here represents two meanings, one is the natural El Nino's impact on shipping, and the other is the deeper shipping El Nino's impact on shipping from local political economy and areas military conflicts.

In 2023, the maritime market in terms of energy shipowners have achieved good gains, the dry bulk cargo transport market first fell and then rose, the overall container market capacity is still excess, although the end of the year because of the Red Sea crisis made the container market has risen significantly.

In 2023, the drought in the Panama Canal caused by El Nino led to the restriction of shipping traffic, which caused some ships to be diverted. The Red Sea crisis in the fourth quarter caused a large number of ships to sail around the Cape of Good Hope; Sanctions imposed on Russia because of the conflict with Ukraine have sent Russian oil exports across the ocean. These have undoubtedly increased worldwide seaborne ton-miles, which is one of the most significant features of the seaborne market in 2023.

The ton-mile statistics take into account both the volume of trade and the distance to which cargo are transported, providing a better indicator of changes in overall maritime transport. According to hiFleet shipping big data statistics, the overall sea cargo ton-mile growth in 2023 is close to 5.0%, and the worldwide trade volume grows at 2.5% due to the weakening of China's overall demand. It can be seen that the overall impact of ships sailing or trade traveling on sea transportation is particularly prominent in 2023.

The impact of seaborne ton-miles in different sectors on its market during 2023 is evident, most prominently in petroleum products, liquefied petroleum gas and crude oil. The impact of the Russia-Ukraine conflict has led to a clear shift in trade, with Russian oil travelling a longer distance to the east, while European imports come further out into the Indian Ocean, US long-haul exports to Asia have also increased significantly, motor vehicle exports from the Far East to Europe have also seen an increase in seaborne ton-miles, and dry bulk cargo ton-miles have seen minimal overall growth.

Major shifts in trade patterns are not often repeated, but the increasing complexity of seaborne trade is an increasingly important trend in the shipping industry, and HiFleet is monitoring global ship dynamics and tonnages distribution on a daily basis, and we sincerely hope that the platform can contribute to the strategic development of shipping.