



# 2023年 第48周市场周报

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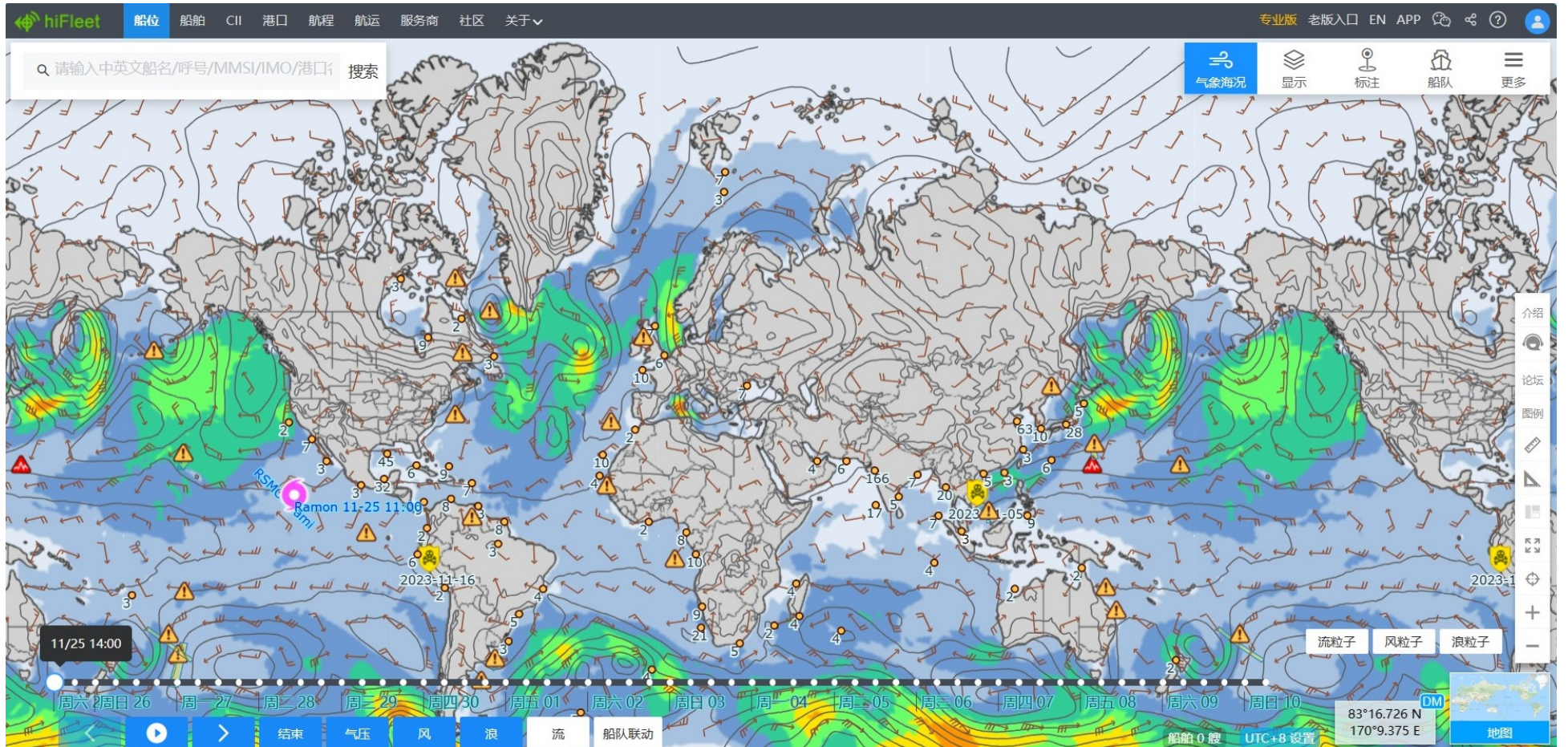
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本周话题 WEEKLY TOPIC



# 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758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 758 navigational warnings in effect around the ocean on hiFleet with the Far East and around the coastal of Caribbean Sea being the majority. Please pay attention to the navigational warnings in relevant waters.

## 航海气象 Meteorology

本周受冷空气影响，中国渤海、黄海海域风力6-7级，相关海域将出现2-3米的大浪，东海和台湾海峡阵风有时8级，台湾海峡和台湾以东洋面有时出现4.5米的巨浪，南海北部2.5-3.5的大浪，有时会有4-5米巨浪。太平洋和北大西洋北部低压活动开始频繁并加强，海况开始变得恶劣。This week, influenced by cold air, the wind force in the Bohai, Yellow areas of China will reach strong breeze to near gale. The relative areas are expected to experience moderate to rough sea. East China Sea and Taiwan Strait areas of China sometimes reach gale. Taiwan Strait and East of Taiwan will encounter very rough sea. The northern part of the South China Sea will see rough sea and happen to see very rough sea. Low-pressure activities in the North Pacific and north part of North Atlantic are becoming frequent and strengthening, leading to deteriorating sea conditions.

## 海盗事件 Piracy

最近一周发生的海盗事件发生在11月22号印尼杜迈锚地。四名印尼持刀劫匪登上了一艘在印尼杜迈抛锚的油轮。他们威胁并挟持了值班水手，而二水设法逃脱并通知值班官。船上警报响起，船员们集合起来。看到船员的警觉，行凶者空手而逃。The latest piracy reports within the week: 22.11.2023: 2135 UTC: Position: 01:43.20N - 101:26.72E, Dumai Anchorage Indonesia. Four robbers armed with knives boarded an anchored tanker. They threatened and took hostage the duty AB while the OS managed to escape and inform the Duty Officer. Alarm raised and crew mustered. Seeing the crew alertness, the perpetrators escaped empty handed.

## 海上事件 Marine Incidents

上周hiFleet报到了一起红海5100车位滚装船被胡赛组织武装劫持，被控制在也门荷台达港，其船东和营运人还在多方接触中以图释放船员和船舶。一波未平一波又起，第二艘以色列拥有集装箱船CMA CGM SYMI (2022年建造) 上周五在印度洋被一架疑似伊朗制造的神风特攻队无人机击中。这架无人机在击中船只时爆炸，造成了船舶损坏，但没有造成船员受伤。法国达飞轮船公司从总部位于新加坡的东太平洋航运公司租用了该船，悬挂马耳他国旗，15294 箱位。东太平洋航运公司的最终所有者是以色列船东和投资者伊丹·奥弗。Last week hiFleet reported the hijacking of a 5,100-ceu ro-ro ship in the Red Sea by Houthi fighters, present at Houthi-controlled port of Hodeidah in Yemen. Owner and operator are still in a multi-party approach to release the crew and the ship. One after another, a second Israeli-owned container ship, CMA CGM SYMI (built in 2022), was hit by a suspected Iranian-made Kamikaze drone in the Indian Ocean last Friday. The drone exploded when it hit the ship, causing damage but no injuries to the crew. The French Shipping company CMA CGM chartered the Maltese flagged 15,294 Teu container from Singapore-based Eastern Pacific Shipping. The ultimate owner of the Eastern Pacific Shipping is Idan Ofer, an Israeli shipowner and investor.

## 其它 Others

无 Nil

## 备注 Remark

本报告数据截止时间为2023年11月26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 November 26 of 2023; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

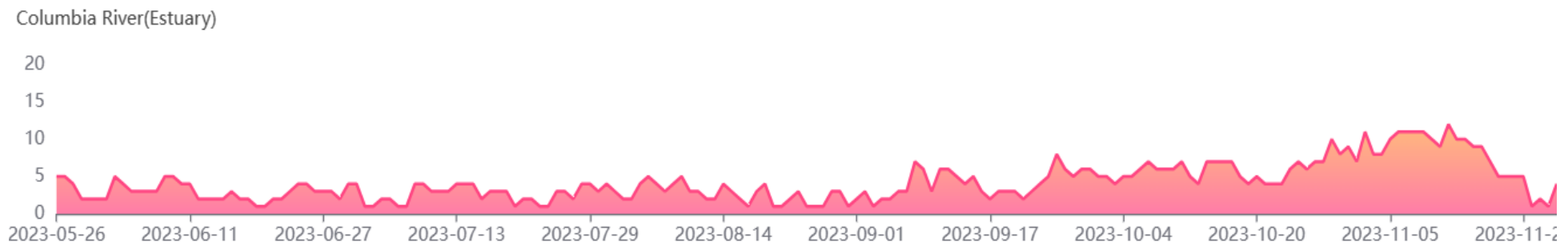
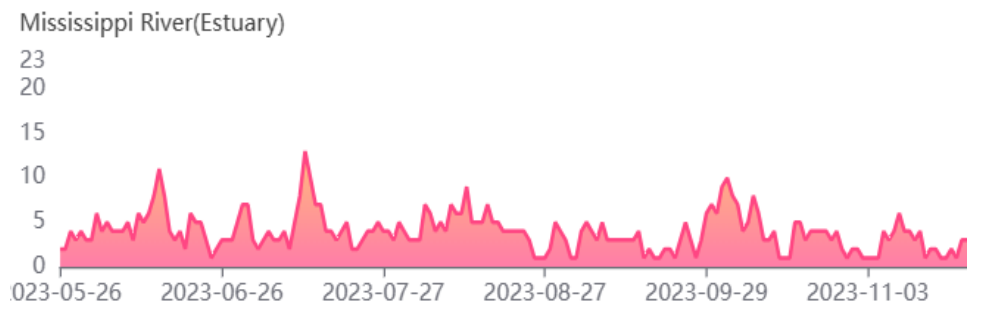
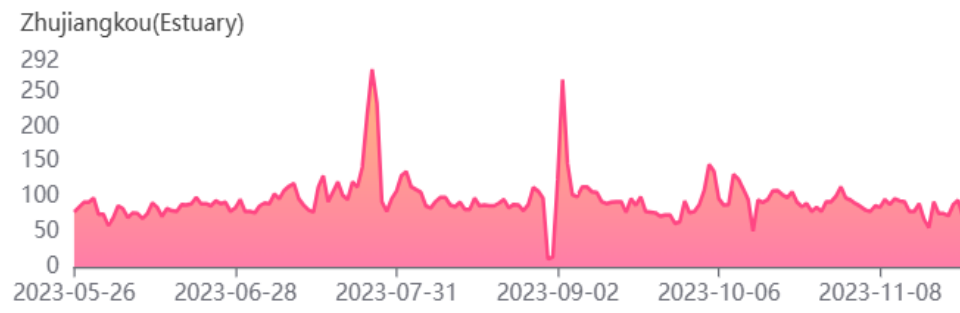
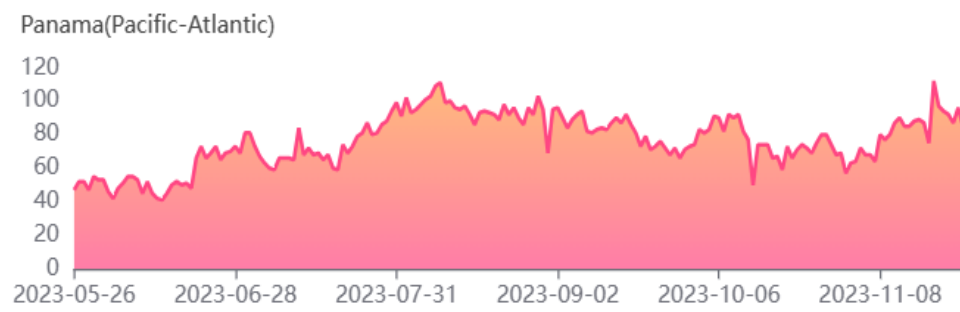
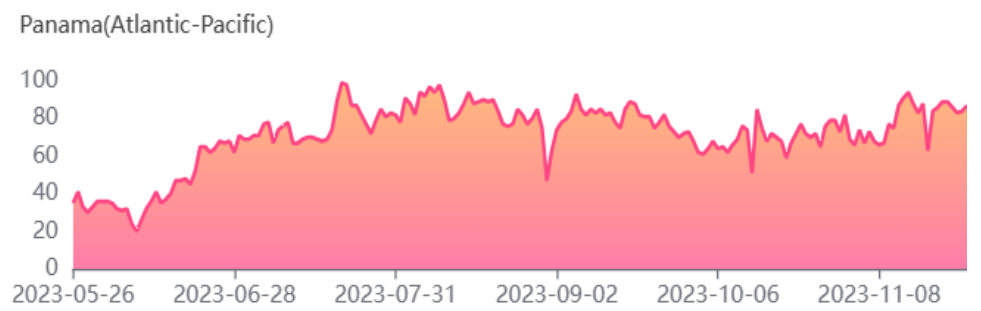
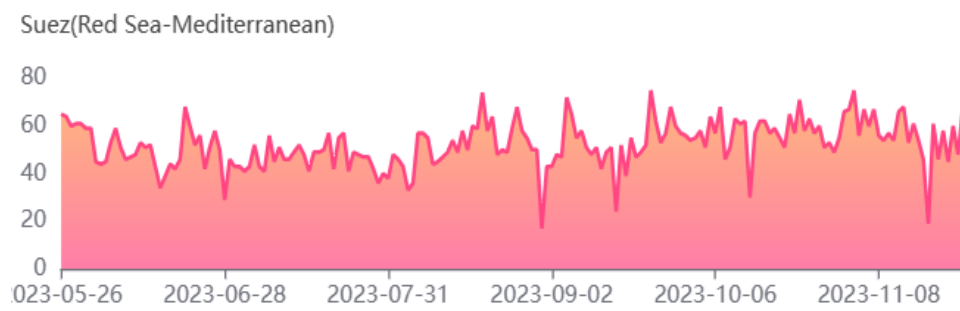
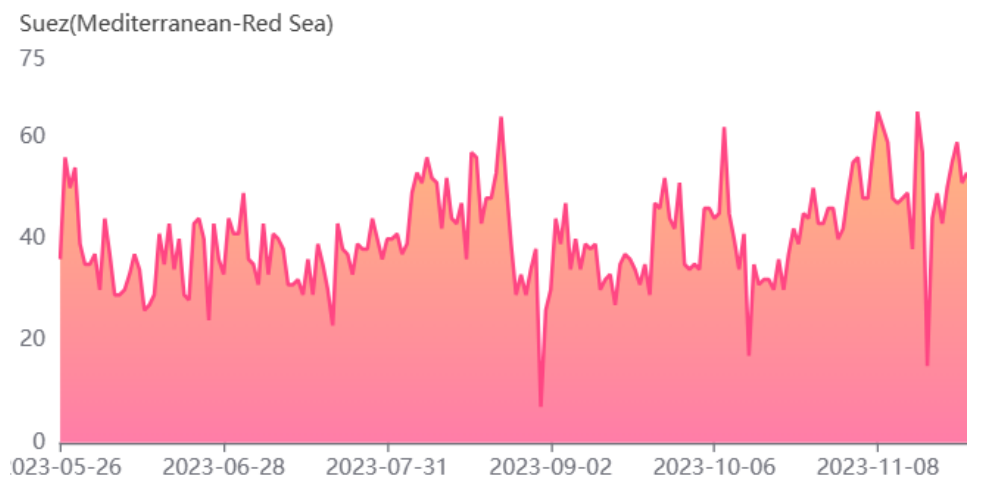


## 第二部分 航运数据 SHIPPING DATA

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	76	1665	34	7
Miss.Riv.	3	56	5	-59
CJK	114	3434	77	-720
Pa.Atlan.	87	2297	10	300
Colum.Riv.	4	219	-44	51
Suez.Med.	53	1444	41	306
Pa.Pac.	90	2343	42	128
ZJK	72	2495	-7	-359

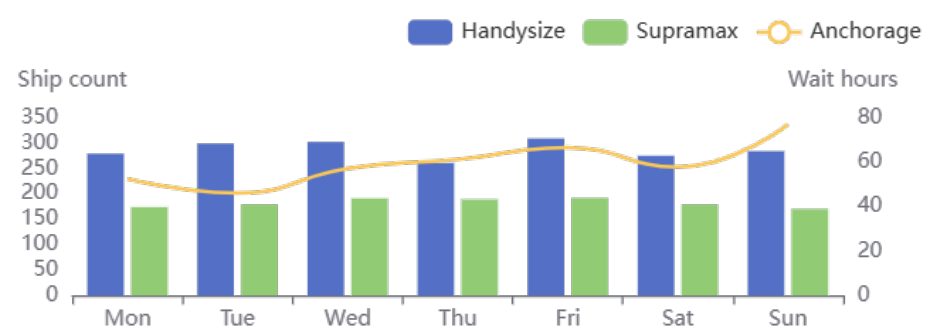


(P.N-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

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

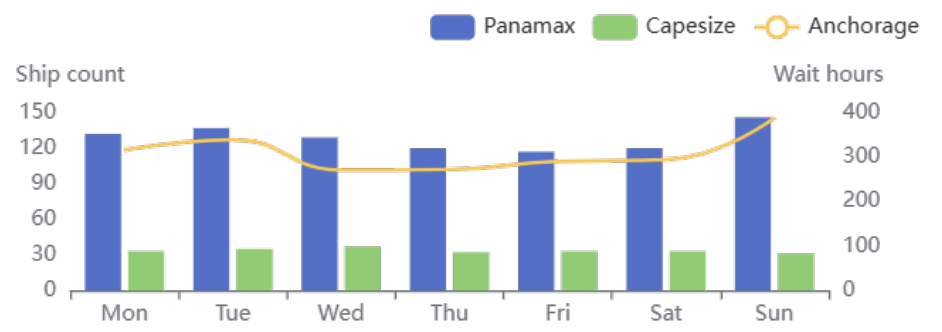
Type	M	T	W	Th	F	Sat	Sun
HDY	279	299	302	261	309	275	284
SMX	174	179	191	189	192	179	170
WT.h.	52.5	46.1	57.1	61.2	66.5	57.8	77



## 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

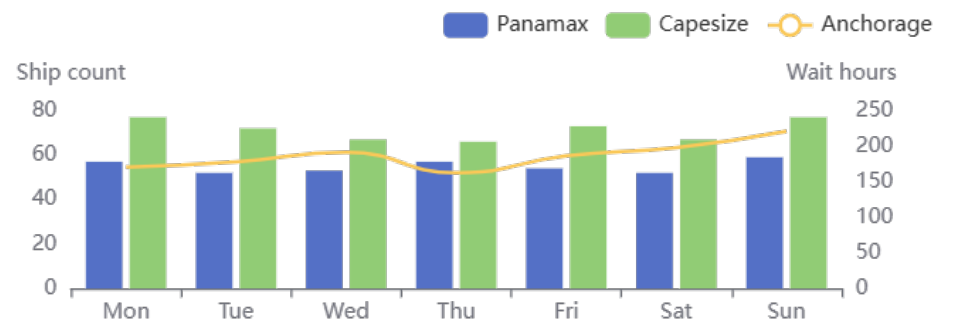
Type	M	T	W	Th	F	Sat	Sun
Pan.	132	137	129	120	117	120	146
Cap	33	35	37	32	33	33	31
WT.h.	315.7	338.9	270.9	272.4	290.5	294.2	389



## 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

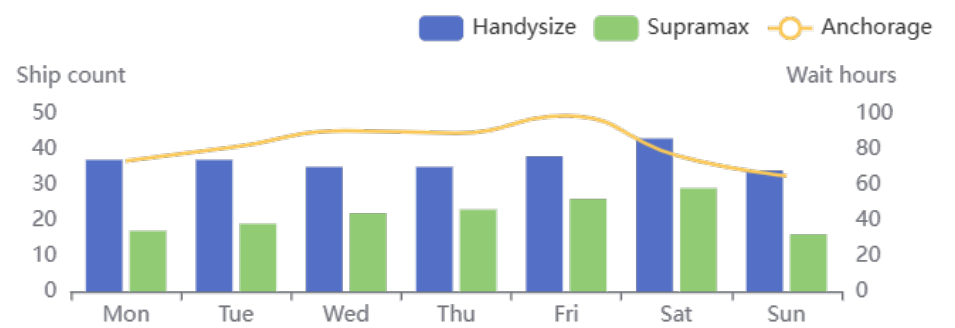
Type	M	T	W	Th	F	Sat	Sun
Pan.	57	52	53	57	54	52	59
Cap	77	72	67	66	73	67	77
WT.h.	170.45	178.1	191.6	162.5	186.5	197.9	221



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

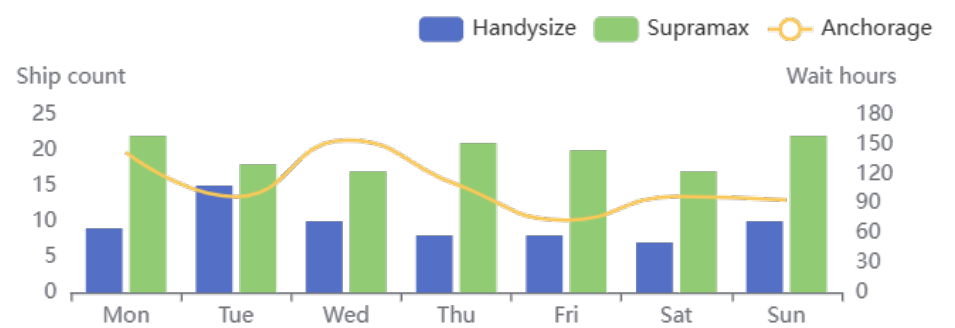
Type	M	T	W	Th	F	Sat	Sun
HDY	37	37	35	35	38	43	34
SMX	17	19	22	23	26	29	16
WT.h.	73.4	81.4	90.4	89.1	98.75	76.5	65



## 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

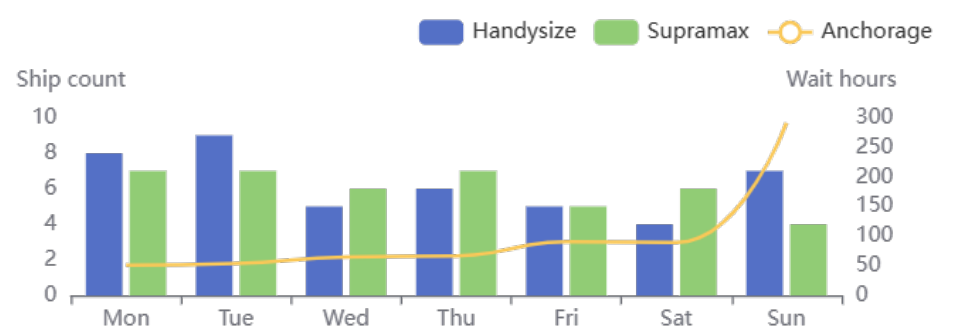
Type	M	T	W	Th	F	Sat	Sun
HDY	9	15	10	8	8	7	10
SMX	22	18	17	21	20	17	22
WT.h.	141.9	96.9	154.2	109.4	73.2	97.2	93.5



## 最近一周拉普拉特河区域超大型散货船和灵便型散货船舶锚泊数量和平均锚泊时长

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

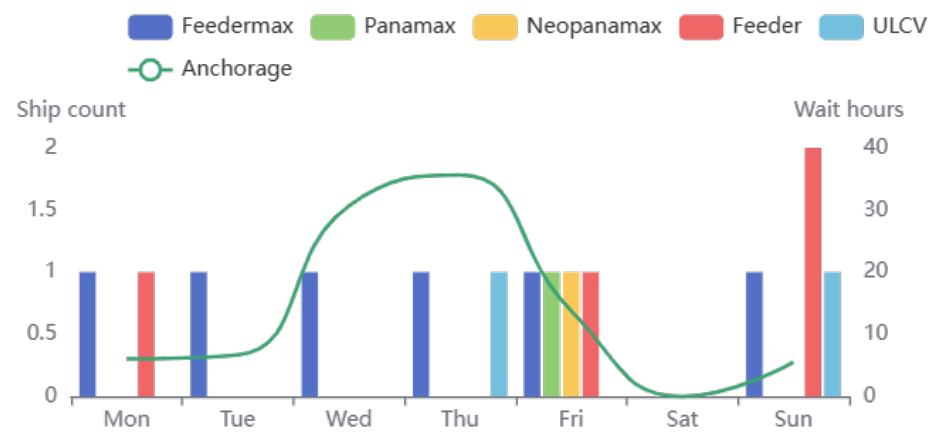
Type	M	T	W	Th	F	Sat	Sun
HDY	8	9	5	6	5	4	7
SMX	7	7	6	7	5	6	4
WT.h.	51.2	53.95	65	66.5	90.5	89.4	291



## 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

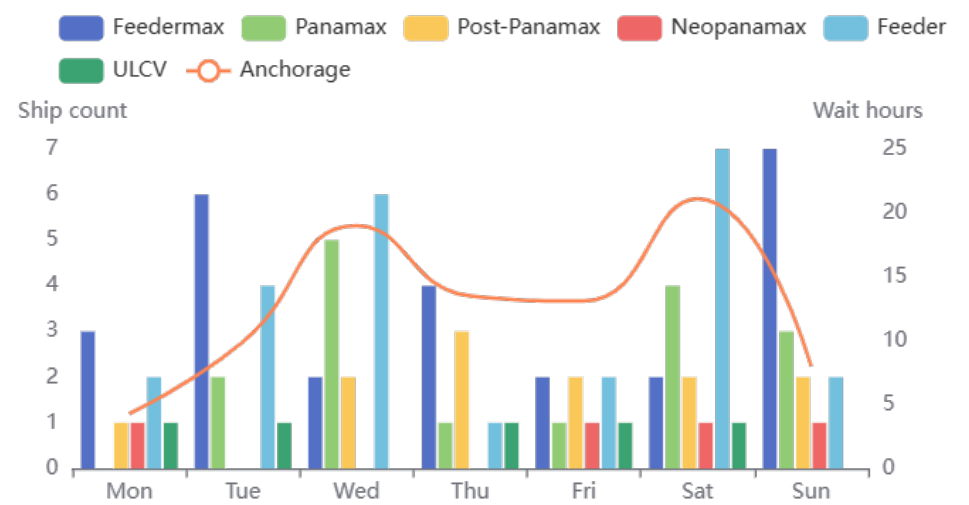
Type	M	T	W	Th	F	Sat	Sun
F.ma.	1	1	1	1	1	0	1
Pan.	0	0	0	0	1	0	0
PPx	0	0	0	0	0	0	0
NPx	0	0	0	0	1	0	0
Fd	1	0	0	0	1	0	2
WT.h.	6.05	6.7	30.7	35.65	13.8	0.0	5.5
UlcV	0	0	0	1	0	0	1



## 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

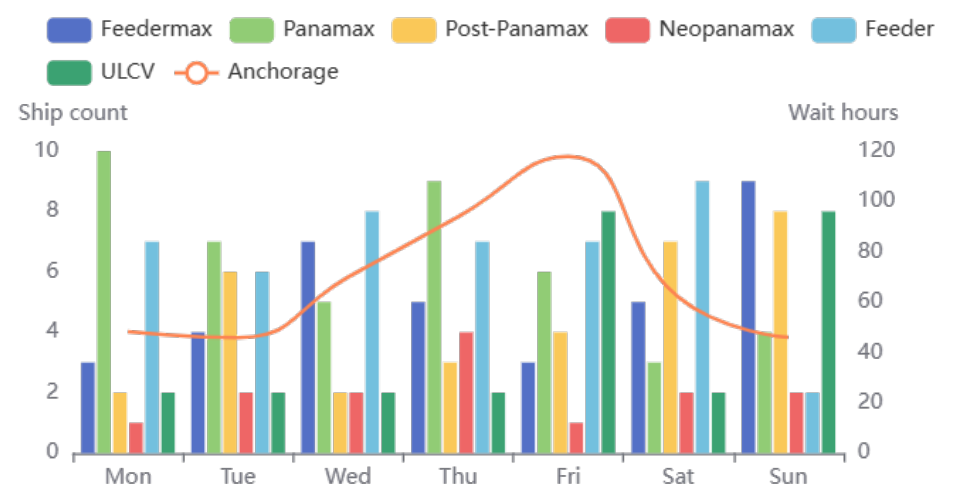
Type	M	T	W	Th	F	Sat	Sun
F.ma.	3	6	2	4	2	2	7
Pan.	0	2	5	1	1	4	3
PPx	1	0	2	3	2	2	2
NPx	1	0	0	0	1	1	1
Fd	2	4	6	1	2	7	2
UlcV	1	1	0	1	1	1	0
WT.h.	4.3	9.9	19	13.5	13.1	21.1	8



## 最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

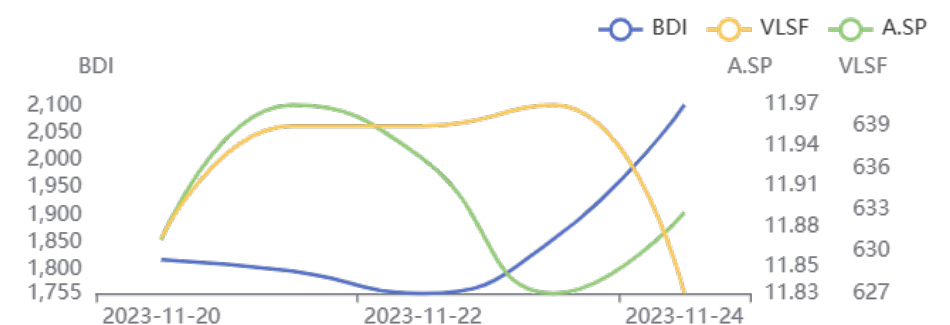
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

Type	M	T	W	Th	F	Sat	Sun
F.ma.	3	4	7	5	3	5	9
Pan.	10	7	5	9	6	3	4
PPx	2	6	2	3	4	7	8
NPx	1	2	2	4	1	2	2
Fd	7	6	8	7	7	9	2
UlcV	2	2	2	2	8	2	8
WT.h.	48.3	45.9	69.9	93.9	117.9	62	46



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

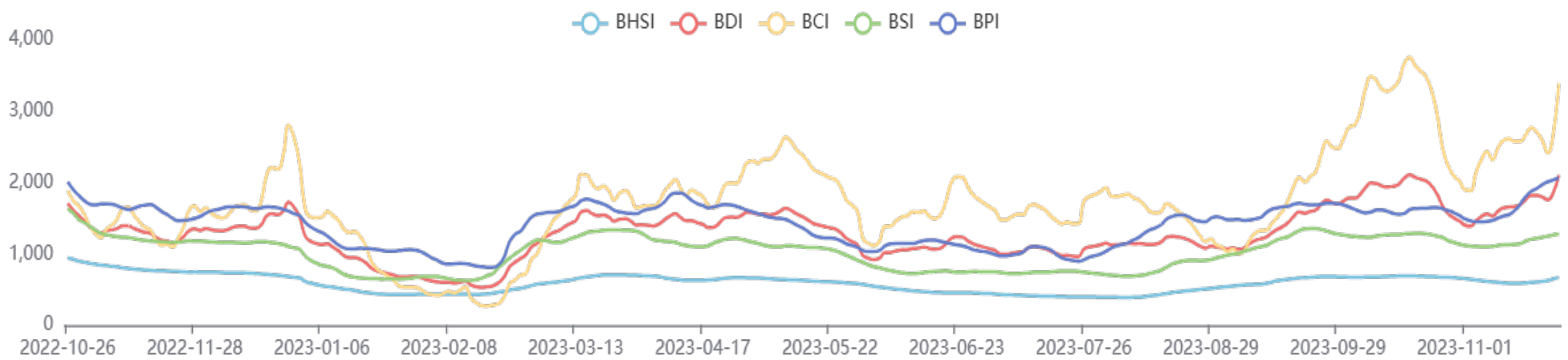
Type	M	T	W	Th	F	Sat	Sun
BDI	1915	1969	2008	2034	2064		
VLSF	631	639	639	640.5	627		
A.SP	11.87	11.97	11.93	11.83	11.89	11.9	



# 第三部分 航运市场 SHIPPING MARKET

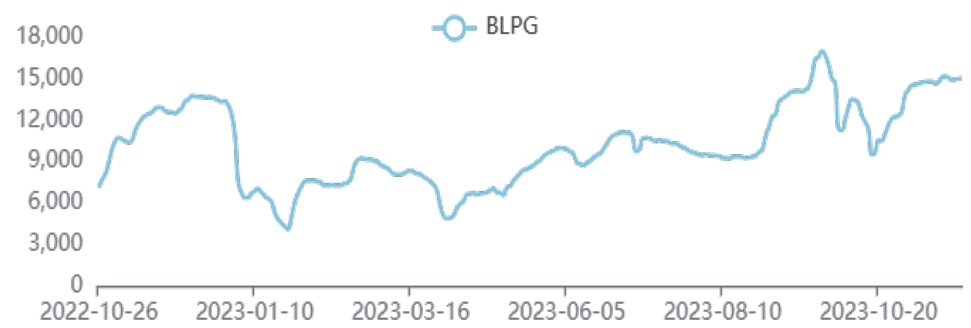
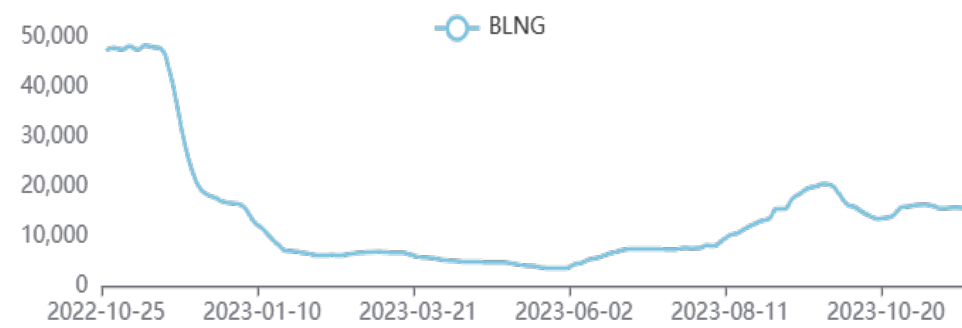
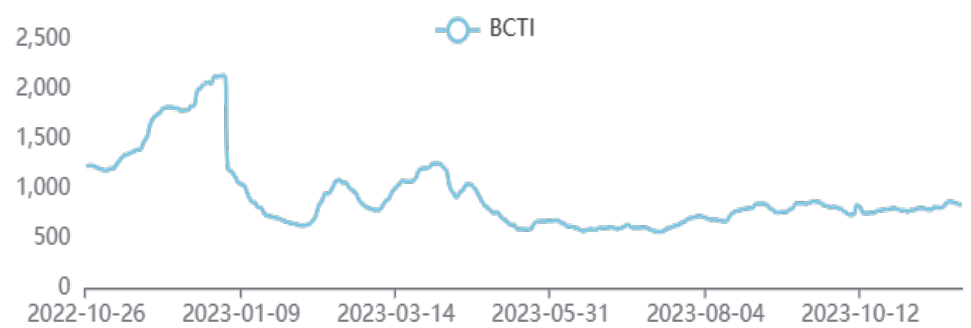
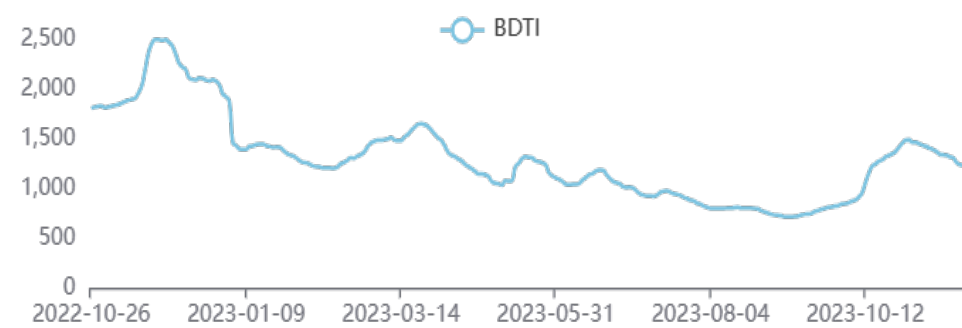
波罗的海干散货指数Baltic Dry Index

Type	PI	WoW	W%	M%	y%
BDI	2102	282.0	15.49	34.48	69.24
BCI	3385	622.0	22.51	52.07	144.58
BPI	2064	190.0	10.14	28.6	40.79
BSI	1279	74.0	6.14	8.02	8.94
BHSI	670	71.0	11.85	-0.15	-10.31



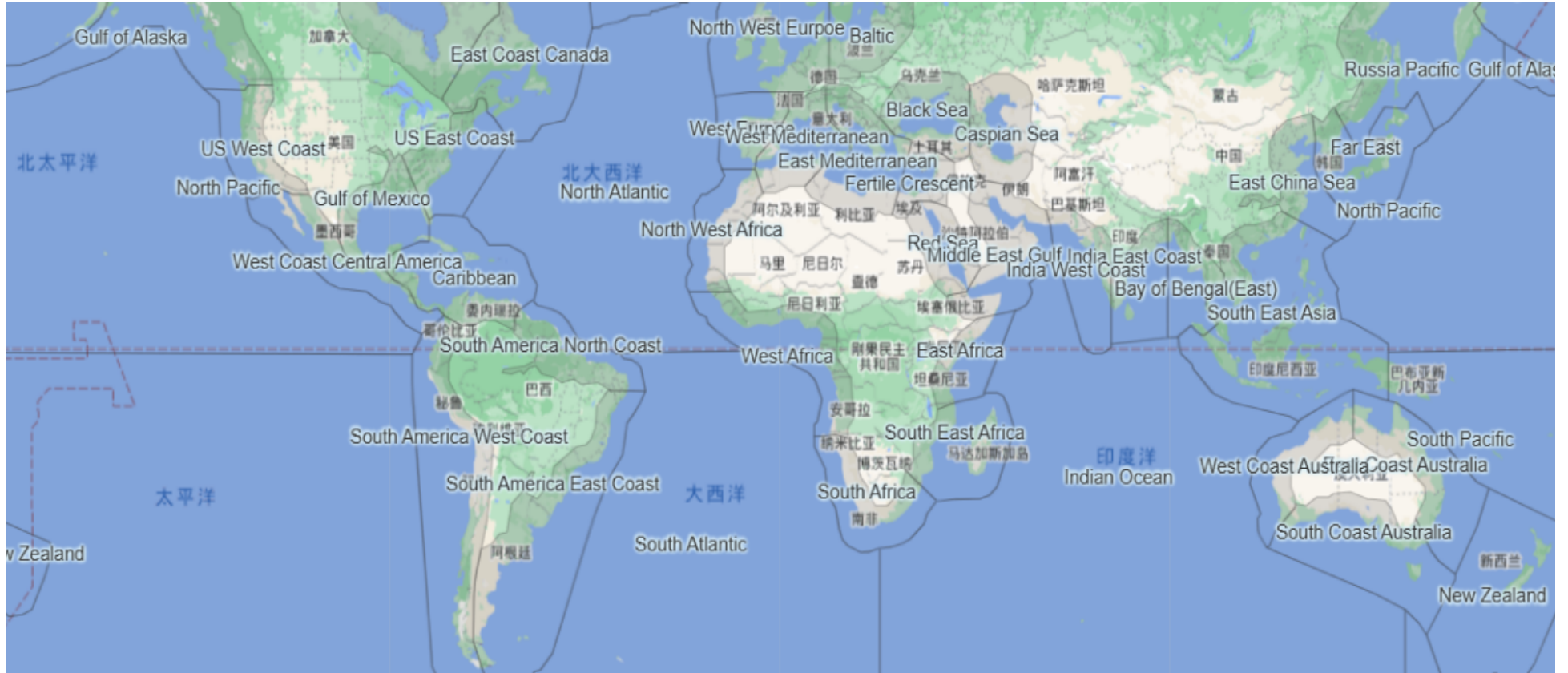
能源运价指数Energy Shipping Index

Type	PI	WoW	W%	M%	y%
BDTI	1233	-84.0	-6.38	-12.8	-50.42
BCTI	829	3.0	0.36	3.5	-52.3
BLNG	15649	17.0	0.11	-1.19	-57.76
BLPG	15024	-137.0	-0.9	22.89	19.51





## 第四部分 运力分布 SUPPLY DISTRIBUTION

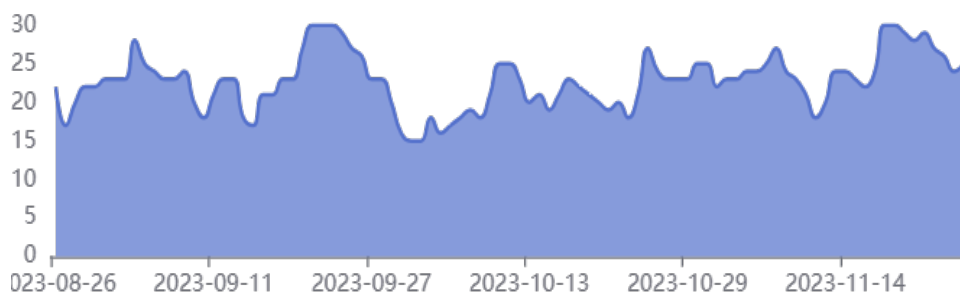


### 好望角型散货船 Capesize

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.

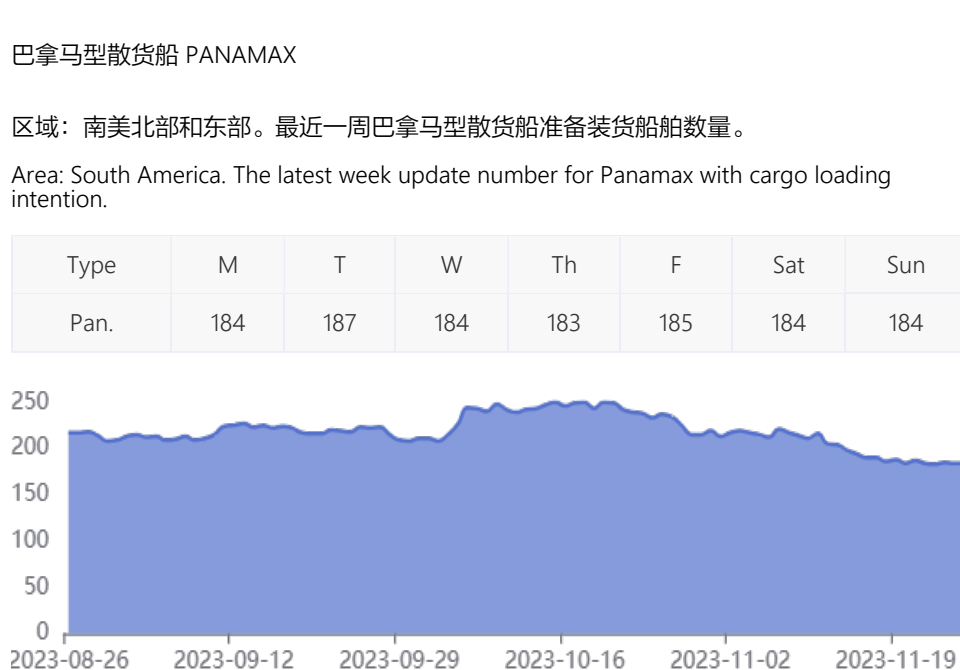
Type	M	T	W	Th	F	Sat	Sun
Cape	29	28	29	27	26	24	25



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	25	27	26	21	28	26	28

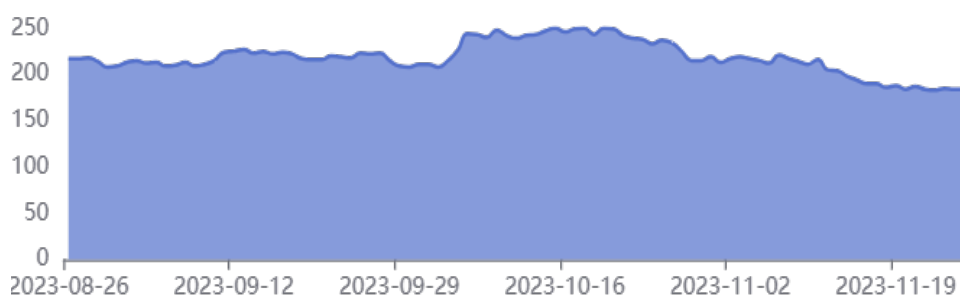


### 巴拿马型散货船 PANAMAX

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.

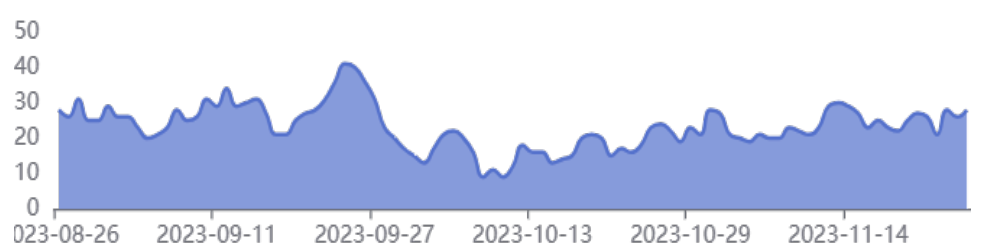
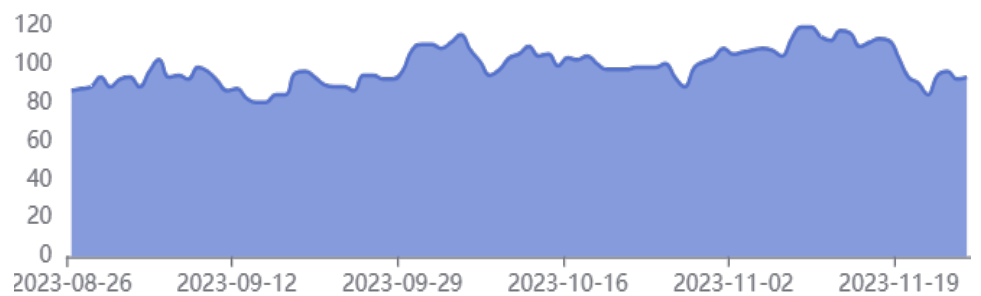
Type	M	T	W	Th	F	Sat	Sun
Pan.	184	187	184	183	185	184	184



区域：澳大利亚，最近一周好望角型散货船准备装货船舶数量。

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

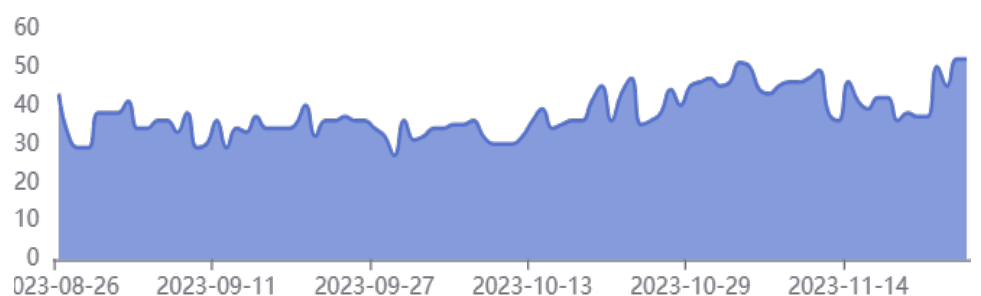
Type	M	T	W	Th	F	Sat	Sun
Cape	93	90	84	94	96	92	93



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.

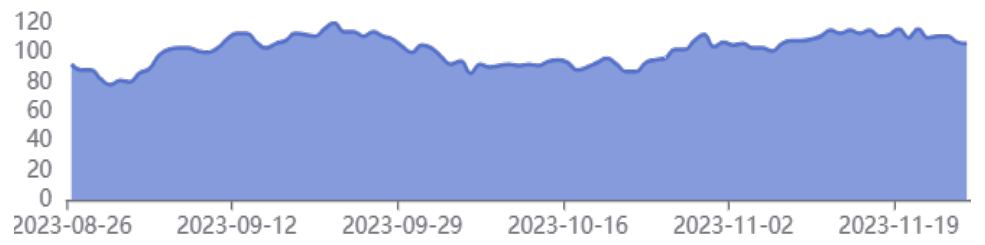
Type	M	T	W	Th	F	Sat	Sun
Pan.	33	37	37	36	33	39	36



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.	110	116	110	111	111	107	106

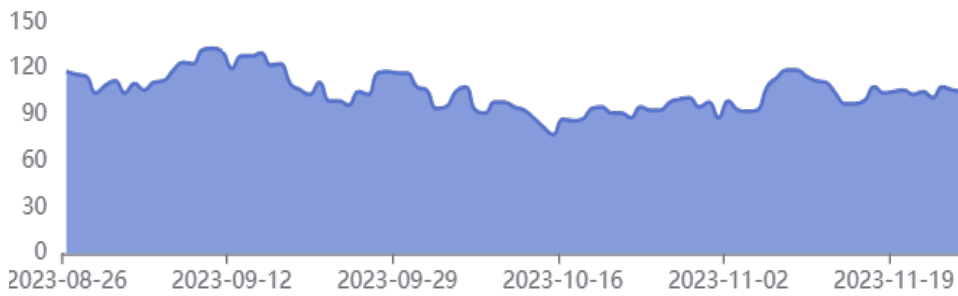


#### 超大灵便型散货 SUPRAMAX

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.

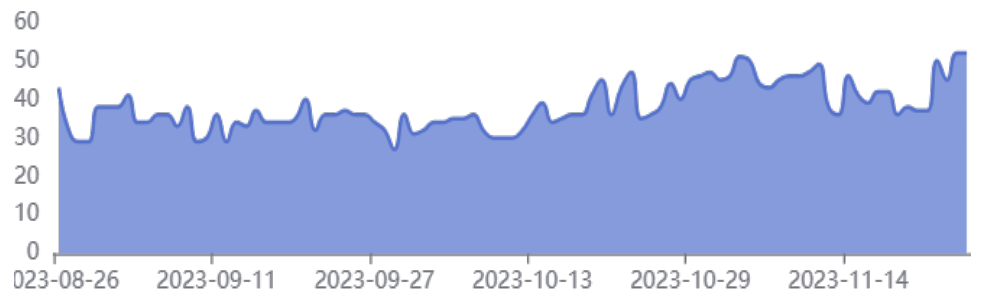
Type	M	T	W	Th	F	Sat	Sun
SMX	106	103	105	101	108	106	105



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.

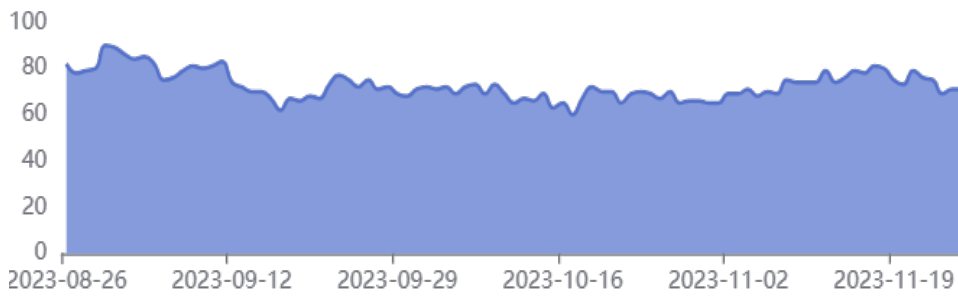
Type	M	T	W	Th	F	Sat	Sun
SMX	38	37	37	50	45	52	52



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.

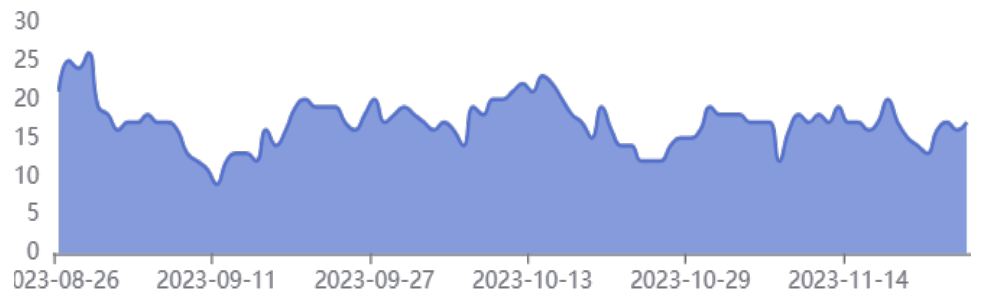
Type	M	T	W	Th	F	Sat	Sun
SMX	15	14	13	16	17	16	17



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	79	76	75	69	71	71

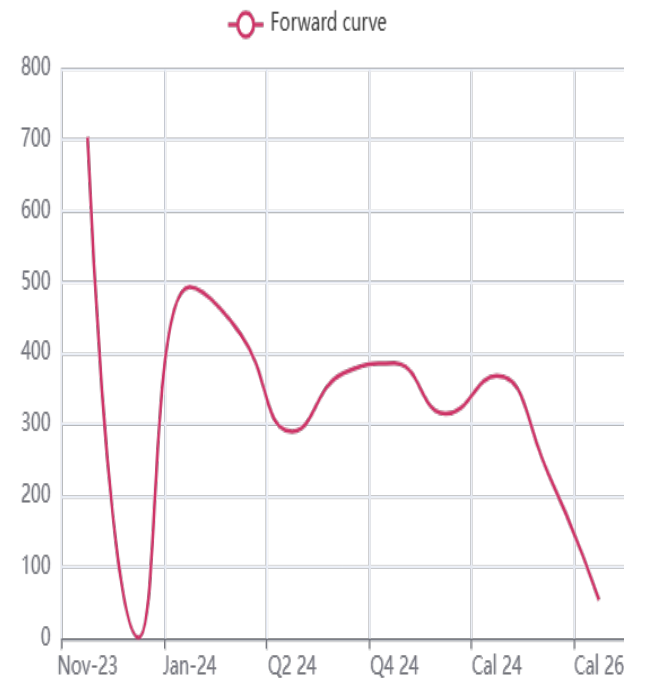
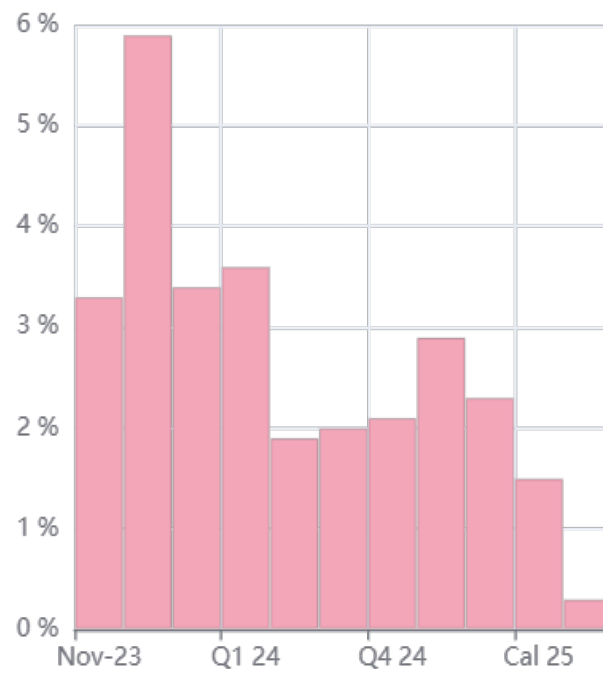




# 第五部分 远期运价协议 FFA

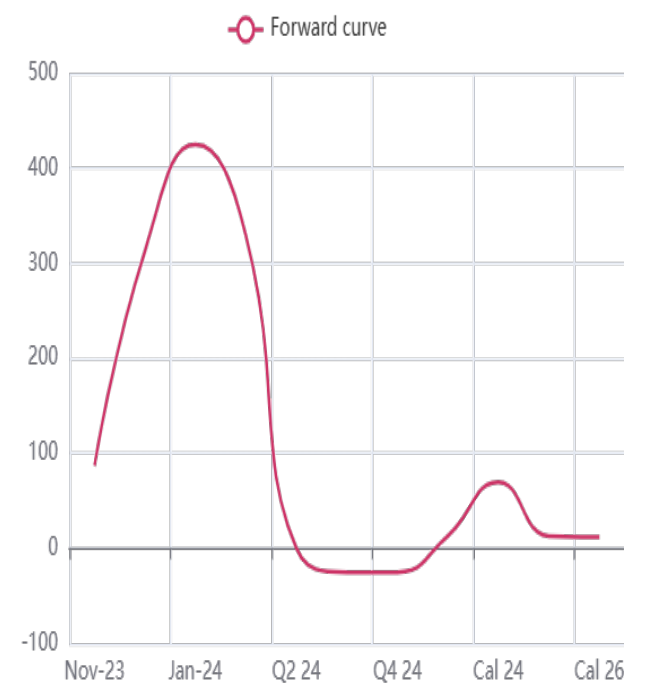
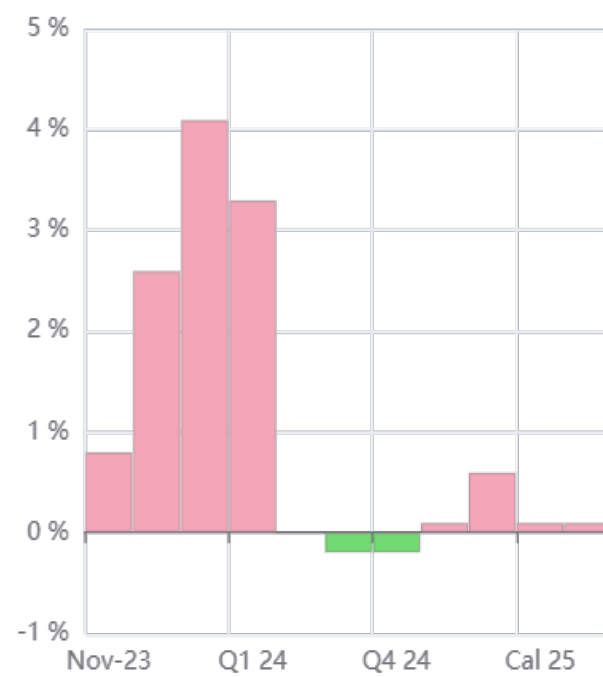
## 好望角型散货船Capesize

STC	\$/day	WoW	
Nov-23	22,146.00	703.0	3.3 %
Dec-23	21,661.00	1211.0	5.9 %
Jan-24	15,036.00	493.0	3.4 %
Q1 24	12,157.33	426.33	3.6 %
Q2 24	15,528.67	290.0	1.9 %
Q3 24	18,636.00	372.0	2.0 %
Q4 24	18,829.00	386.0	2.1 %
Q1 25	11,029.00	315.0	2.9 %
Cal 24	16,287.75	368.58	2.3 %
Cal 25	16,054.00	233.0	1.5 %
Cal 26	16,036.00	54.0	0.3 %



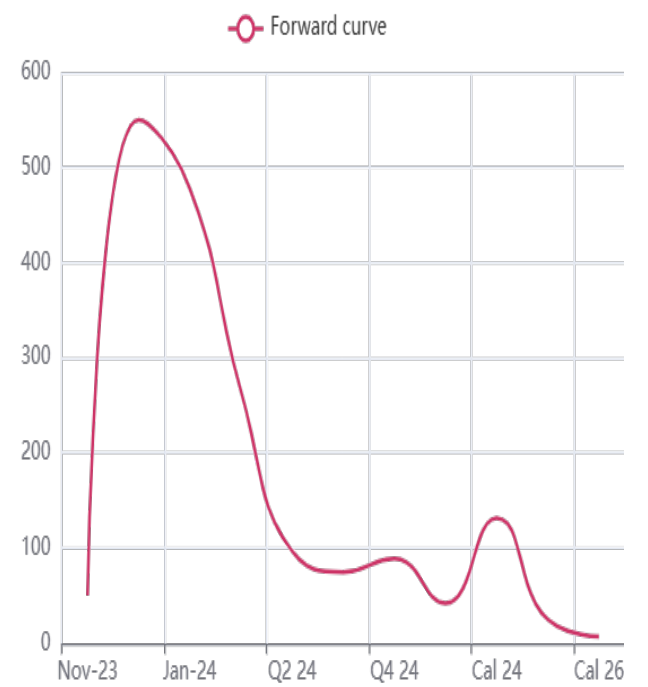
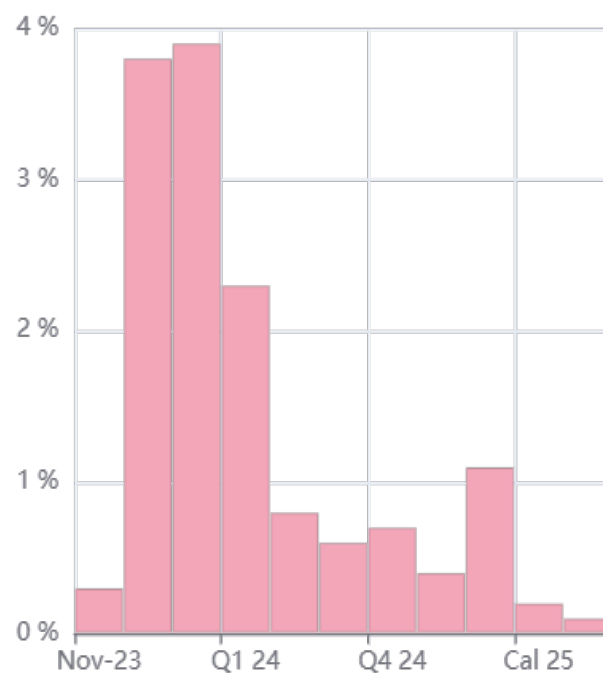
## 灵便型散货船Handysize

7TC	\$/day	WoW	
Nov-23	11,406.00	87.0	0.8 %
Dec-23	12,388.00	313.0	2.6 %
Jan-24	10,750.00	425.0	4.1 %
Q1 24	10,279.33	329.0	3.3 %
Q2 24	11,325.00	0.0	0.0 %
Q3 24	11,338.00	-25.0	-0.2 %
Q4 24	11,213.00	-25.0	-25.0 %
Q1 25	10,669.00	13.0	0.1 %
Cal 24	11,038.83	69.75	0.6 %
Cal 25	10,669.00	13.0	0.1 %
Cal 26	10,925.00	12.0	0.1 %



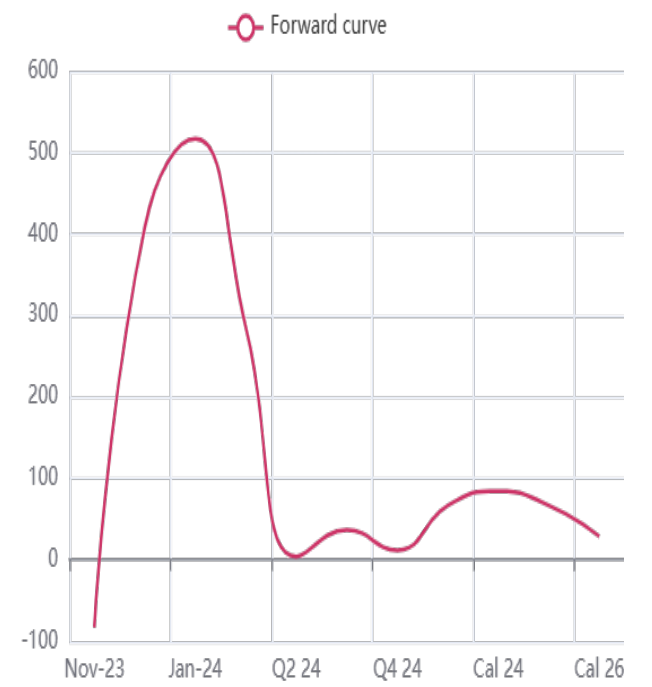
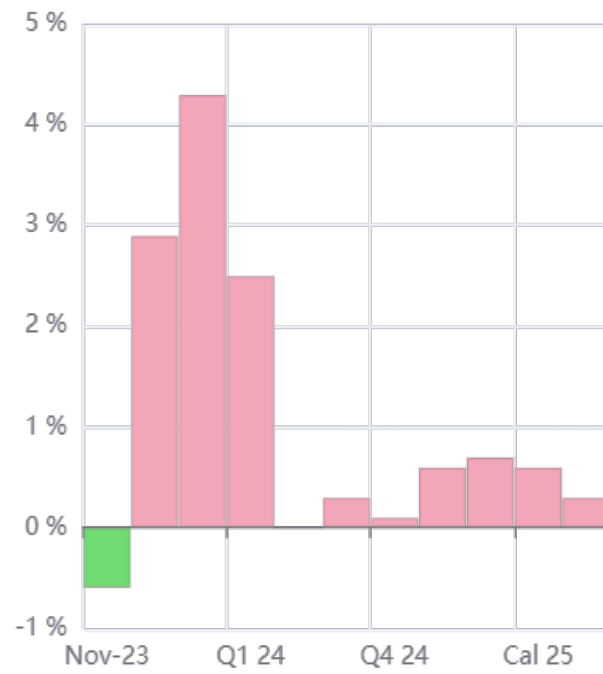
## 巴拿马型散货船Panamax

4TC	\$/day	WoW	
Nov-23	14,614.00	50.0	0.3 %
Dec-23	15,207.00	550.0	3.8 %
Jan-24	12,814.00	478.0	3.9 %
Q1 24	11,904.67	265.33	2.3 %
Q2 24	12,843.00	97.0	0.8 %
Q3 24	12,389.00	75.0	0.6 %
Q4 24	12,143.00	89.0	0.7 %
Q1 25	10,121.00	42.0	0.4 %
Cal 24	12,319.92	131.58	1.1 %
Cal 25	11,431.75	25.0	0.2 %
Cal 26	11,496.00	7.0	0.1 %



## 超大灵便型散货船Supramax

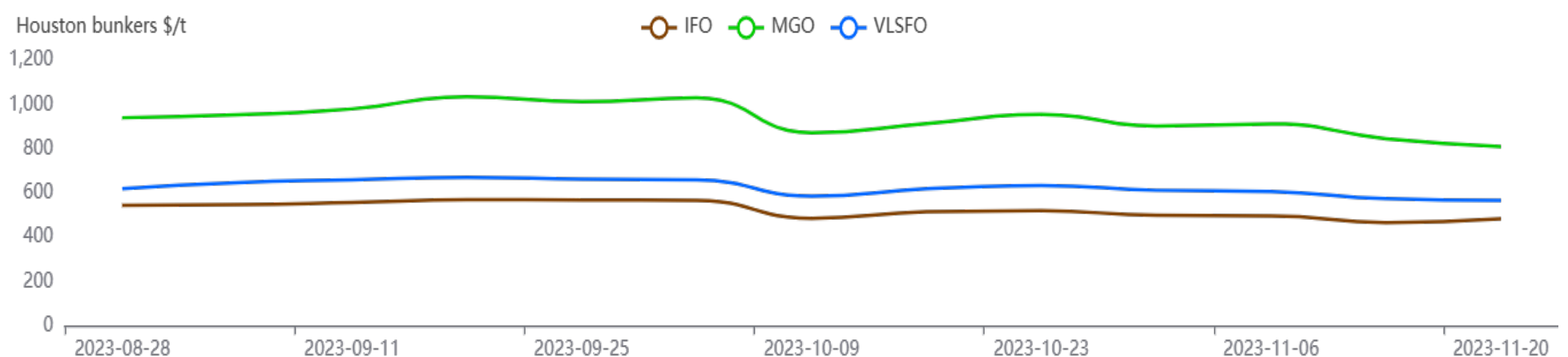
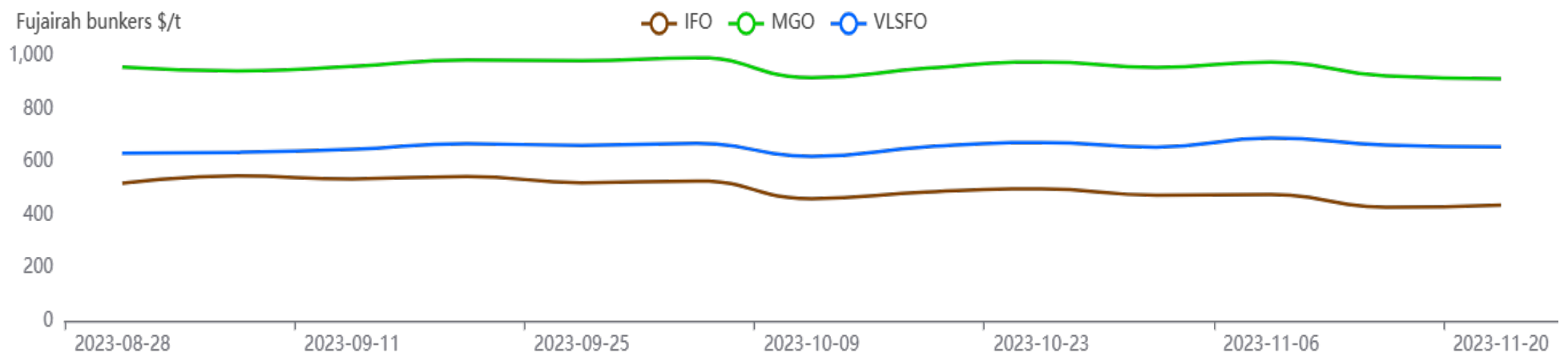
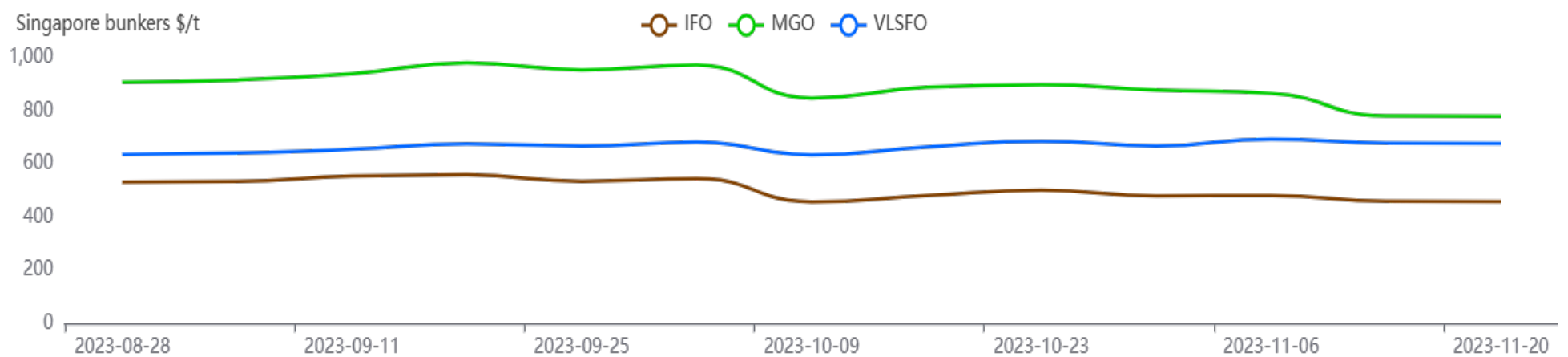
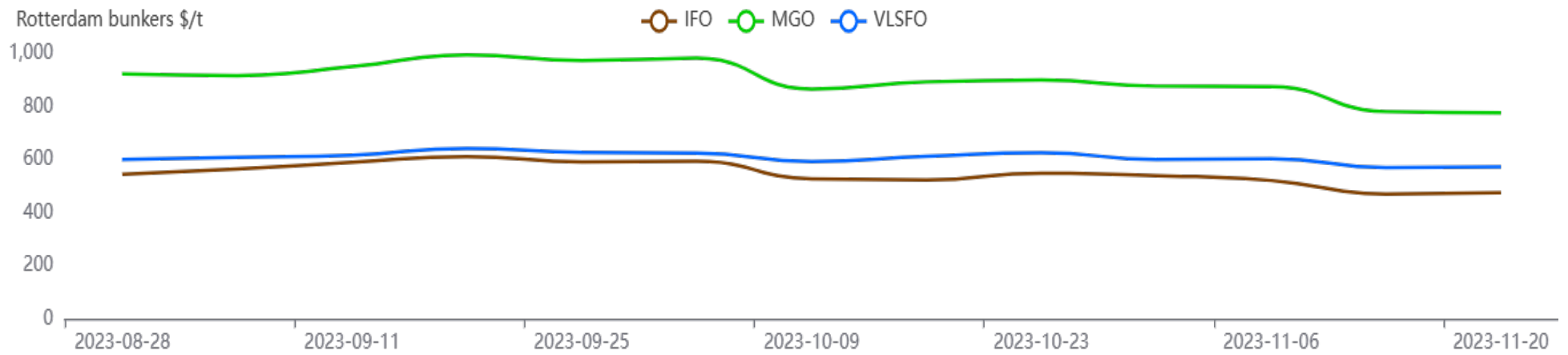
10TC	\$/day	WoW	
Nov-23	13,188.00	-83.0	-0.6 %
Dec-23	14,392.00	409.0	2.9 %
Jan-24	12,592.00	517.0	4.3 %
Q1 24	11,667.00	285.0	2.5 %
Q2 24	12,154.00	4.0	0.0 %
Q3 24	12,325.00	37.0	0.3 %
Q4 24	12,108.00	12.0	0.1 %
Q1 25	11,300.00	67.0	0.6 %
12,063.50	Cal 24	84.5	0.7 %
Cal 25	11,300.00	67.0	0.6 %
Cal 26	11,554.00	29.0	0.3 %



## 第六部分 燃油价格 BUNKER PRICE

MP	LO	HO	MO	SP	WoW	W%	M%
Singapore	698.0	490.5	850.0	207.5	11.0	5.6	N/A
Rotterdam	678.0	459.0	779.5	219.0	0.0	0.0	18.38
Fujairah	573.0	475.5	777.5	97.5	-2.5	-2.5	26.62
Houston	657.5	437.0	915.0	220.5	-15.0	-6.37	26.0

(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		219.36	-3.63	-1.63	-4.05	-27.55
Maize		225.58	2.01	0.9	-8.25	-27.48
Soybeans		261.49	-0.17	-0.06	2.18	-15.82
Rice		244.61	2.46	1.02	1.25	33.43
Barley		219.54	-2.14	-0.97	-2.96	-31.5
Energy		Index	+/-	Weekly	Monthly	YTD
Crude Oil	USD/Bbl	76.96	0.45	0.59	-12.65	-13.09
Brent	USD/Bbl	81.47	0.81	1.0	-11.79	-14.98
Natural Gas	USD/MMBtu	2.9	-0.27	-8.52	-0.68	-52.38
Gasoline	USD/Gal	2.2	0.05	2.33	-7.17	-16.03
Heating Oil	USD/Gal	2.81	0.1	3.69	-11.08	-22.16
Ethanol	USD/Gal	1.88	0.02	1.08	-19.66	-28.24
Naphtha	USD/T	626.76	4.15	0.67	-4.07	-8.93
Propane	USD/Gal	0.64	0.01	1.59	-7.25	-27.27
Uranium	USD/Lbs	74.0	0.35	0.48	7.25	45.81
Methanol	CNY/T	2472.0	12.0	0.49	2.02	-7.97
TTF Gas	EUR/MWh	46.68	0.68	1.48	-4.25	-54.68
UK Gas	GBP/thm	118.87	3.47	3.01	-0.84	-47.96
Industrial		Index	+/-	Weekly	Monthly	YTD
Copper	USD/Lbs	3.75	0.13	3.59	6.23	-4.58
Coal	USD/T	123.3	0.0	0.0	-10.65	-62.27
Steel	CNY/T	3952.0	64.0	1.65	9.99	6.96
Iron Ore	USD/T	132.5	2.5	1.92	14.22	41.71
Aluminum	USD/T	2235.5	18.5	0.83	2.88	-9.26
Iron Ore Fe 62%	USD/T	2235.5	18.5	0.83	2.88	-9.26
Metals		Index	+/-	Weekly	Monthly	YTD
Gold	USD/t.oz	1979.3	41.5	2.14	-0.12	12.31
Silver	USD/t.oz	23.59	1.56	7.08	1.42	9.62
Platium	USD/t.oz	904.6	59.1	6.99	1.3	-10.79
Currencies		Index	+/-	Weekly	Monthly	YTD
EUR/USD		1.09	0.02	1.87	2.83	5.83
USD/CNY		7.17	-0.13	-1.78	-2.05	1.99

## 第八部分 本周话题 WEEKLY TOPIC

### 本周话题

招商局重工旗下的能源航运公司订购了首台VLCC双燃料甲醇发动机。该主机将由中国船舶重工集团公司柴油机有限责任公司制造，并将采用废气再循环排放系统。这艘 VLCC 由大连船舶重工有限责任公司建造，预计将于 2026 年 4 月交付。对于未来VLCC船队而言这是一个重要的标志性事件，凸显了该行业越来越关注采用替代燃料来减少碳排放和促进可持续航运。航运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。这艘3850载重货船是与承租人嘉吉共同开发的。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或得的新造船订单最多。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。 One energy shipping company, a subsidiary of China Merchants Heavy Industry (CMHI), has placed an order for the first dual-fuel methanol engine in the VLCC segment. The main engine will be built by CSE (China Shipbuilding Industry Corporation Diesel Engine Co., Ltd.) and will feature MAN Energy Solutions' proprietary Exhaust Gas Recirculation (EGR) emissions system. The VLCC is being built by Dalian Shipbuilding Industry Co (DSIC) with delivery expected by April 2026. This is an important landmark event for the future VLCC fleet, highlighting the industry's growing focus on alternative fuels to reduce carbon emissions and promote sustainable shipping. The transition to decarbonization from the present stage to the future of shipping is a big challenge and opportunity. So far we can see that in addition to the shipping industry's interest in methanol dual-fuel power engines, we have also seen the debut of ammonia dual-fuel engines, and some shipowners are also focusing on a comprehensive variety of emission reduction measures. German ship owner Gersides Green has ordered two general cargo ships in Damen, the Netherlands, to be fitted with batteries and wind power. The 3850 DWT cargo ship was jointly developed with charterer Cargill. French ship owner Louis Dreyfus Armateurs will build three modern in China, low-emission, wind-assisted dual-fuel ro-ro vessels for Airbus Cargo. So far, containers with methanol dual fuel engines have the most new shipbuilding orders. Whether on land or at sea, we are witnessing a grand era of decarbonization, shipowners and charterers are actively responding to it, or being exit by The Times, or becoming the leaders of The Times, and the new era of shipping requires a new way of thinking and operating.

