



2023年 第49周市场周报

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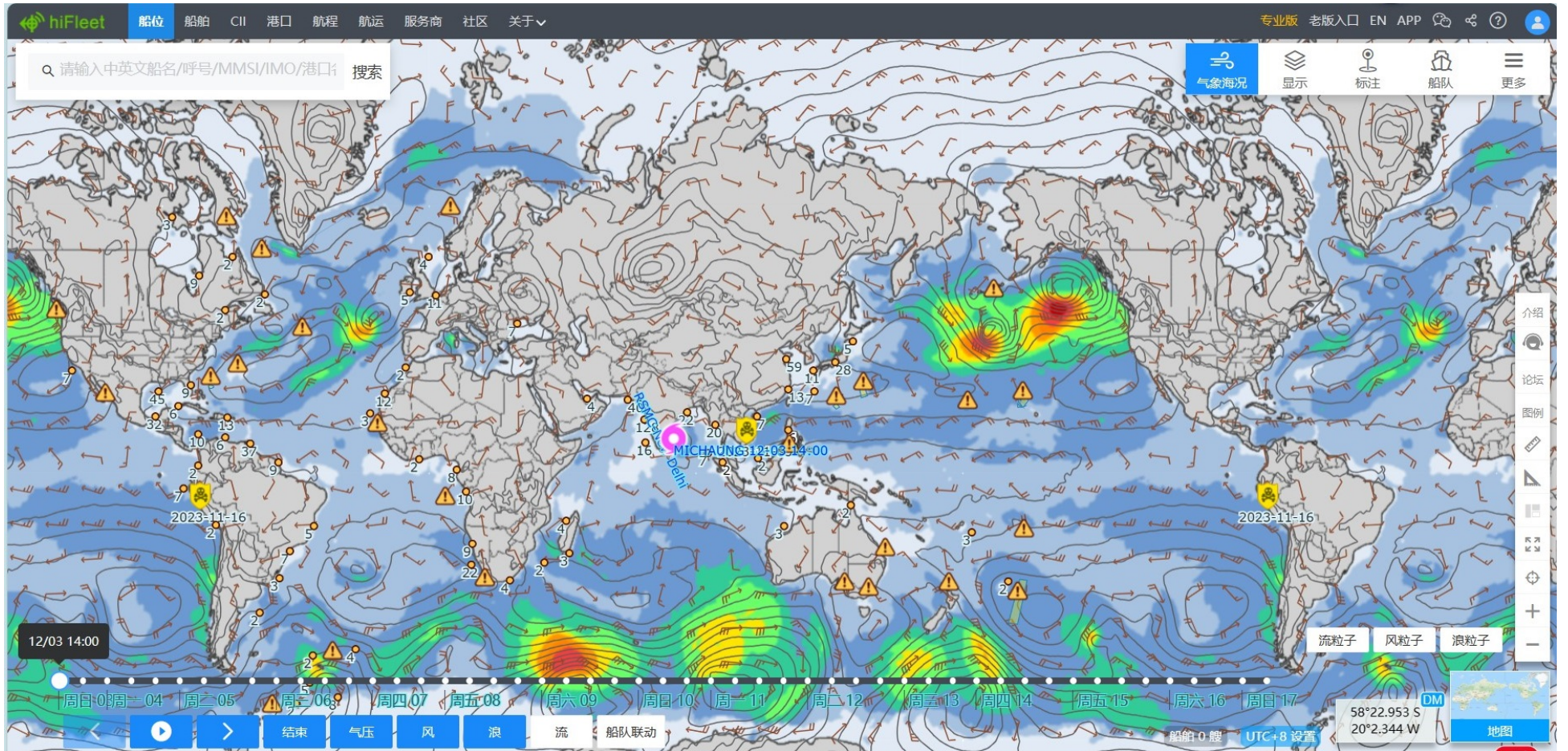
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第八部分

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759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 759 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，阵风8级，相关海域将出现3-4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，南海大部海域、北部湾将先后有6~7级、阵风8级的风，海面有时会有4-5米巨浪。太平洋东北部低压活动加强，海况正在变得恶劣。This week influenced by cold air, the wind force in the Bohai, Yellow areas of China will reach strong breeze to near gale, sometimes reach gale. The relative areas are expected to experience 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. Most of the South China Sea and the Beibu Gulf will have near gale to gale and there will see rough sea and happen to see very rough sea. Low-pressure activities in the North East Pacific is becoming 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25号菲律宾马尼拉湾锚地。五名未获授权人员透过锚链管登上锚泊的货柜船。值班水手注意到这些人，并发出警报，导致这些人带着偷来的船上财产逃跑。VTMS马尼拉通知并派出一艘巡逻艇搜索了该地区。The latest piracy reports within the week: 25.11.2023: 1845 UTC: Posn: 14:36.72N - 120:49.56E, Manila Bay Anchorage, Philippines. Five unauthorised persons boarded an anchored container ship through the hawse pipe. Duty AB on rounds noticed the persons and raised the alarm resulting in the persons escaping with stolen ships properties. VTMS Manila notified and a patrol boat was dispatched to search the area.

海上事件 Marine Incidents

一艘货船在菲律宾外海搁浅并部分沉没，17名船员全部获救。这艘4100载重吨的“越海之星”号(2007年建造)11月28号在巴拉巴克附近海域发出了求救信号。该船越南船员在菲律宾海岸警卫队的帮助下撤离。这艘悬挂越南国旗的船只载着4000吨大米从胡志明驶往菲律宾的卡加延德奥罗。All 17 seafarers have been rescued after a vessel grounded and partially sank off the Philippines. The 4,100-dwt Viet Hai Star (built 2007) issued a distress call on 28th November near Balabac. The Vietnamese crew were evacuated under PNPMG. The Vietnam-flag vessel was sailing from Ho Chi Minh with a 4,000-dwt rice, bound for Cagayan de Oro in the Philippines.

其它 Others

无 Nil

备注 Remark

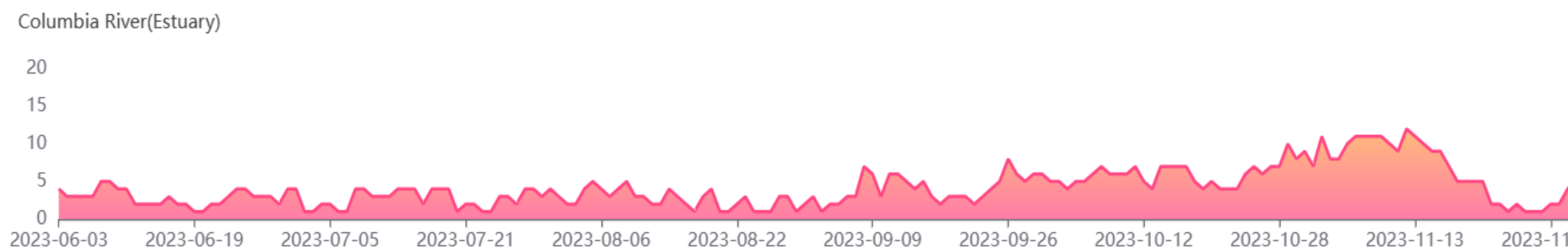
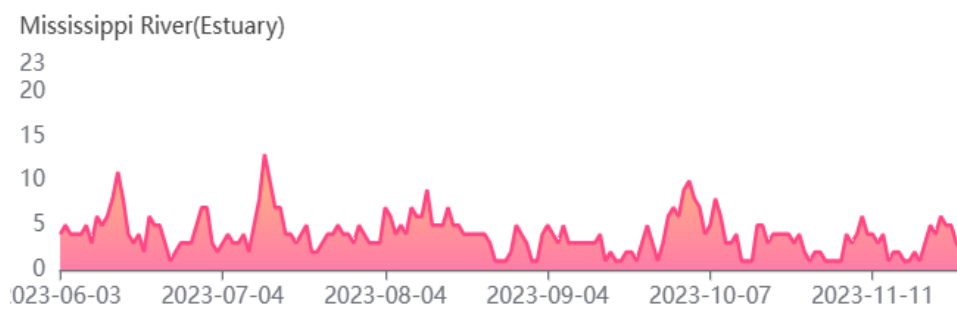
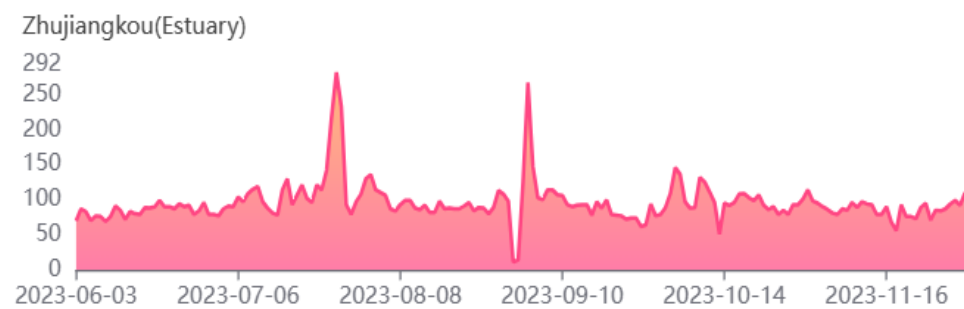
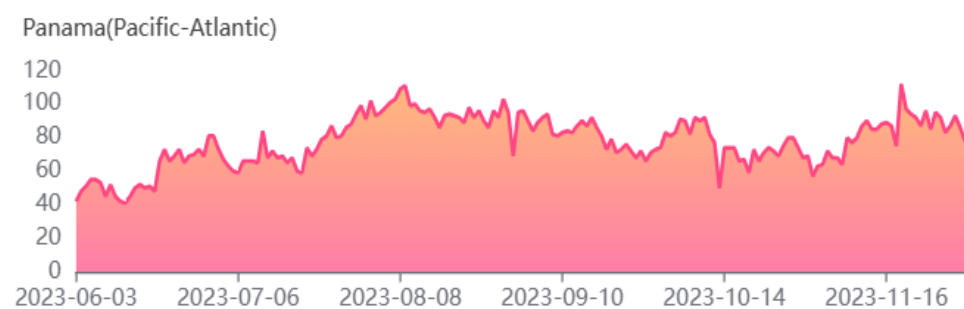
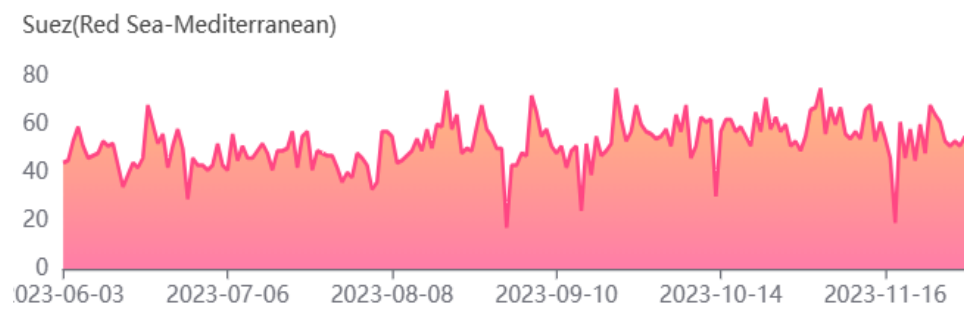
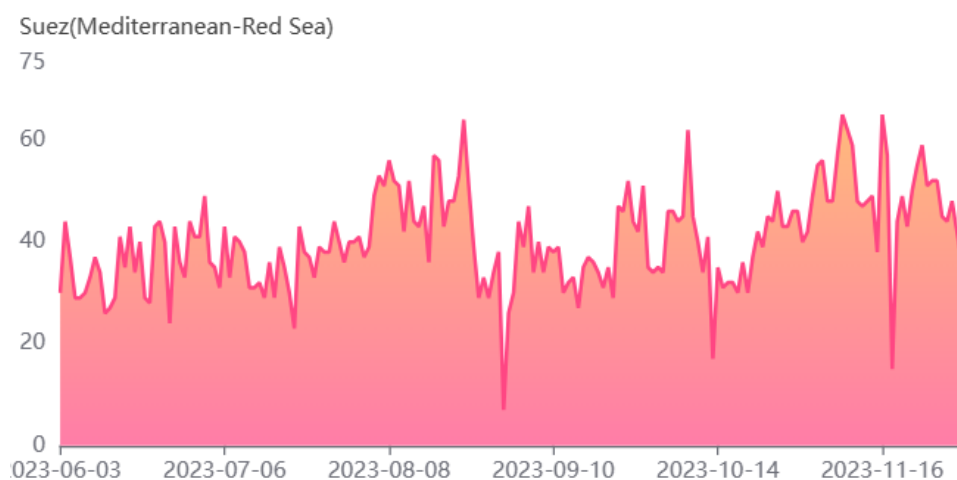
本报告数据截止时间为2023年12月3日北京时间17点；所有数据和或观点仅供参考，在任何情况下本公司及其员工不承担任何风险。The data deadline for this report is Beijing time 17 hours on December 3 of 2023; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

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	46	1602	-16	-84
Miss.Riv.	2	78	15	4
CJK	125	3378	124	-693
Pa.Atlan.	60	2232	-136	175
Colum.Riv.	5	174	-4	-18
Suez.Med.	26	1402	-58	212
Pa.Pac.	76	2476	-68	384
ZJK	94	2491	87	-284

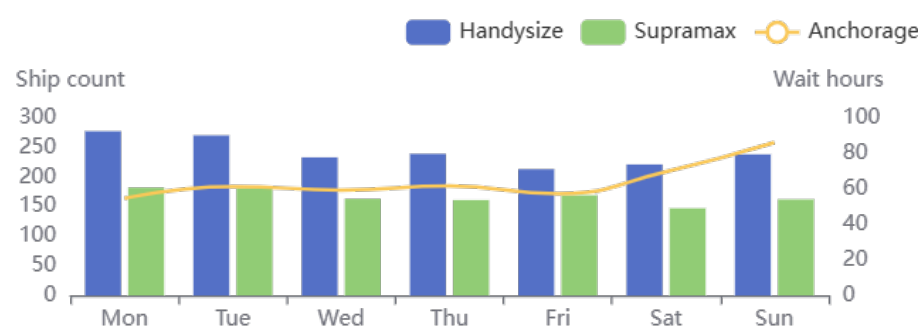


(P.N.-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

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

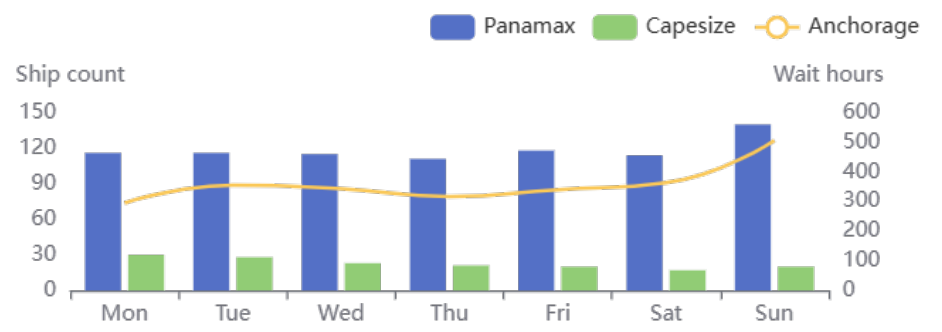
Type	M	T	W	Th	F	Sat	Sun
HDY	277	270	233	239	213	221	238
SMX	182	181	163	161	169	147	162
WT.h.	54.6	61.3	59.3	61.6	57.3	69.6	86



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

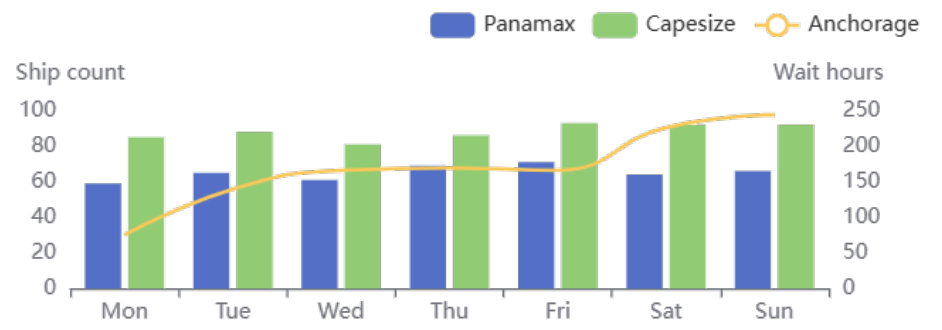
Type	M	T	W	Th	F	Sat	Sun
Pan.	116	116	115	111	118	114	140
Cap	30	28	23	21	20	17	20
WT.h.	295.3	355.5	343.3	316.9	340.1	363.5	506



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

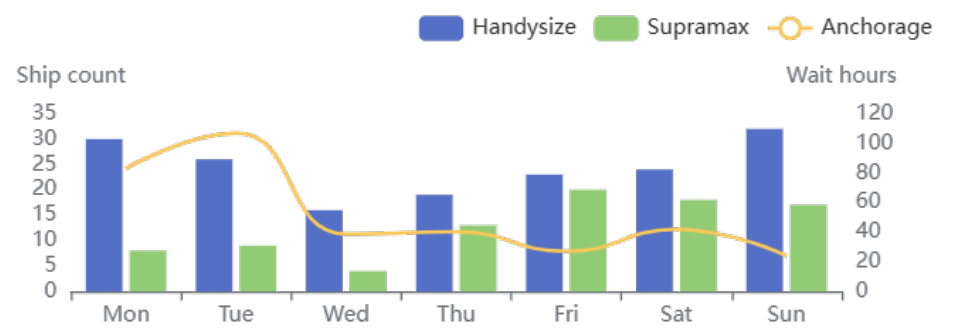
Type	M	T	W	Th	F	Sat	Sun
Pan.	59	65	61	69	71	64	66
Cap	85	88	81	86	93	92	92
WT.h.	75.2	139.6	165.95	169.4	166.15	226.1	244



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

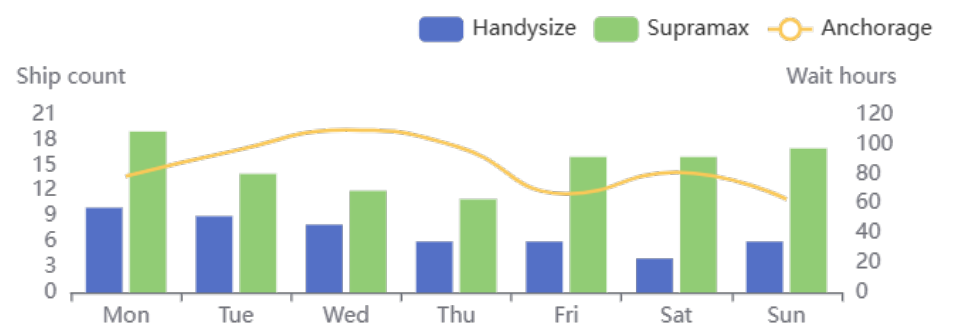
Type	M	T	W	Th	F	Sat	Sun
HDY	30	26	16	19	23	24	32
SMX	8	9	4	13	20	18	17
WT.h.	82.9	106.9	38.7	40.3	27.1	41.9	24



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

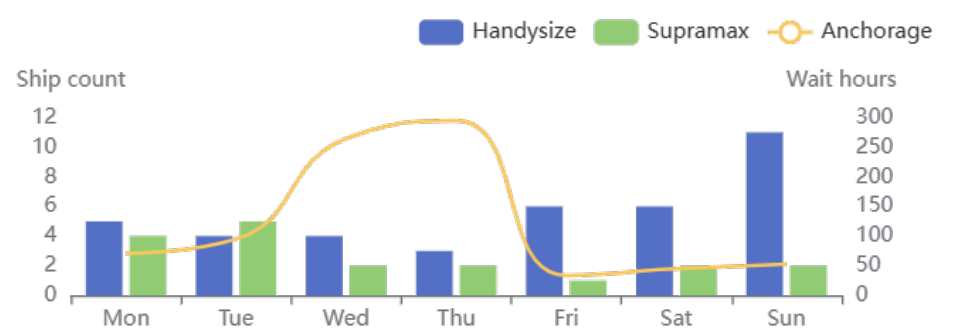
Type	M	T	W	Th	F	Sat	Sun
HDY	10	9	8	6	6	4	6
SMX	19	14	12	11	16	16	17
WT.h.	78.5	95.9	109.6	98.7	66.6	81.05	63



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

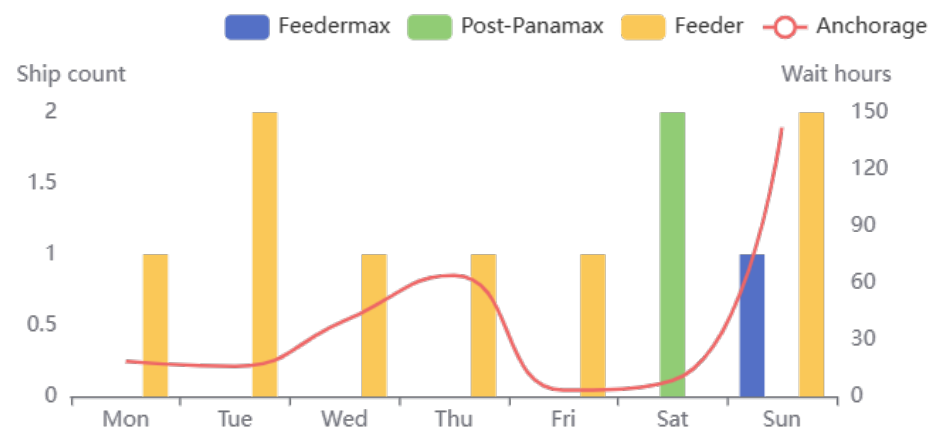
Type	M	T	W	Th	F	Sat	Sun
HDY	5	4	4	3	6	6	11
SMX	4	5	2	2	1	2	2
WT.h.	71	95	264.8	295.1	33.7	45.25	53



最近一周香港区域集装箱船锚泊数量和平均等待时长

Latest Week Update for Container Vessels Num. and Waiting Time Information on Anchorages of HongKong

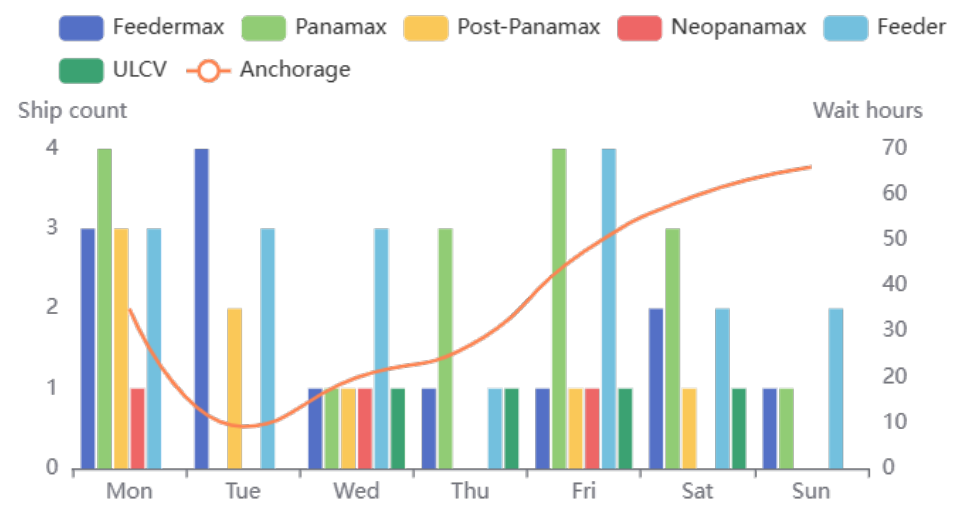
Type	M	T	W	Th	F	Sat	Sun
F.ma.	0	0	0	0	0	0	1
Pan.	0	0	0	0	0	0	0
PPx	0	0	0	0	0	2	0
NPx	0	0	0	0	0	0	0
Fd	1	2	1	1	1	0	2
WT.h.	18.6	16	40	64	3.3	8.4	142
UlcV	0	0	0	0	0	0	0



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

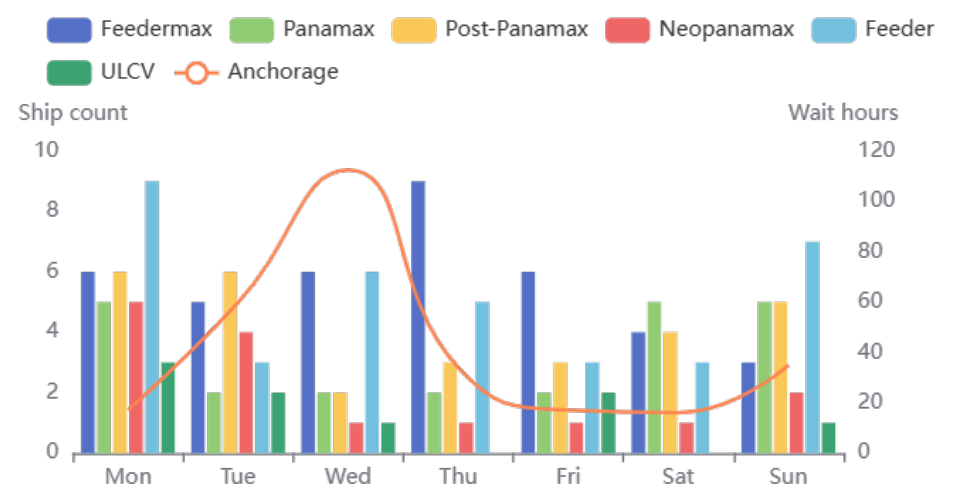
Type	M	T	W	Th	F	Sat	Sun
F.ma.	3	4	1	1	1	2	1
Pan.	4	0	1	3	4	3	1
PPx	3	2	1	0	1	1	0
NPx	1	0	1	0	1	0	0
Fd	3	3	3	1	4	2	2
UlcV	0	0	1	1	1	1	0
WT.h.	35.0	9.2	19.9	27	47.5	59.9	66



最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

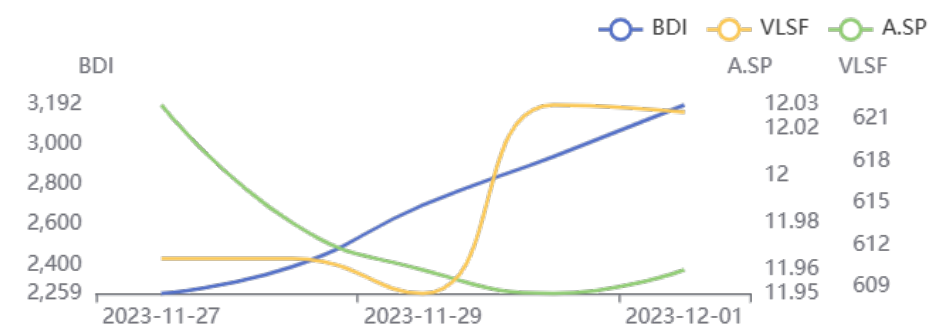
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

Type	M	T	W	Th	F	Sat	Sun
F.ma.	6	5	6	9	6	4	3
Pan.	5	2	2	2	2	5	5
PPx	6	6	2	3	3	4	5
NPx	5	4	1	1	1	1	2
Fd	9	3	6	5	3	3	7
UlcV	3	2	1	0	2	0	1
WT.h.	17.15	59.9	112.5	33.95	17.1	16.1	35



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

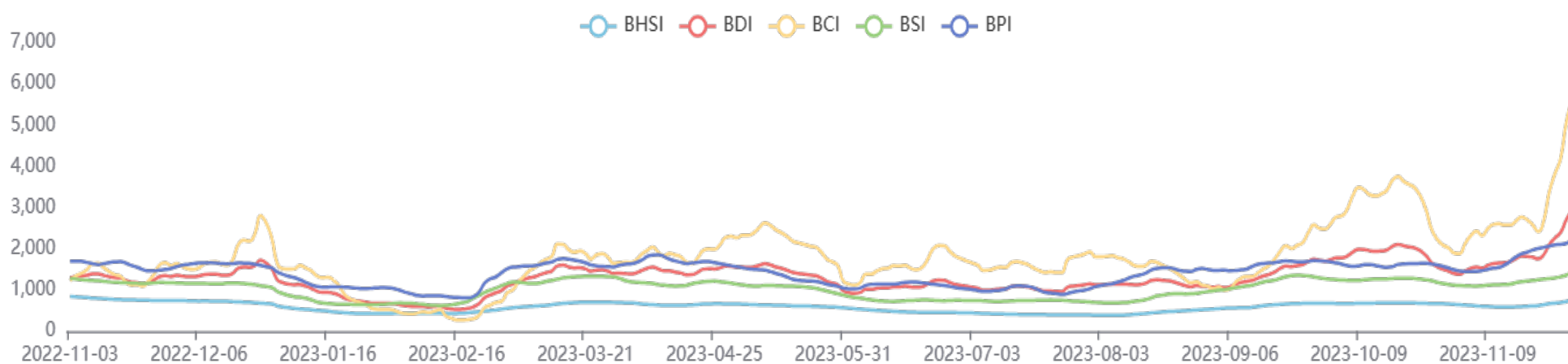
Type	M	T	W	Th	F	Sat	Sun
BDI	2095	2106	2131	2219	2341		
VLSF	611	611	608.5	622	621.5		
A.SP	12.03	11.98	11.96	11.95	11.96	11.98	



第三部分 航运市场 SHIPPING MARKET

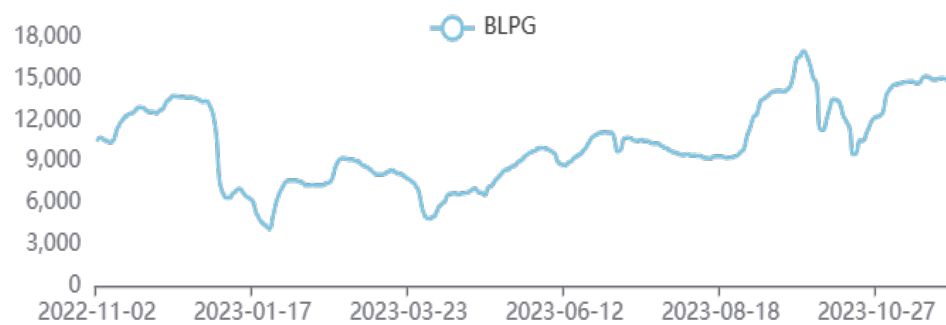
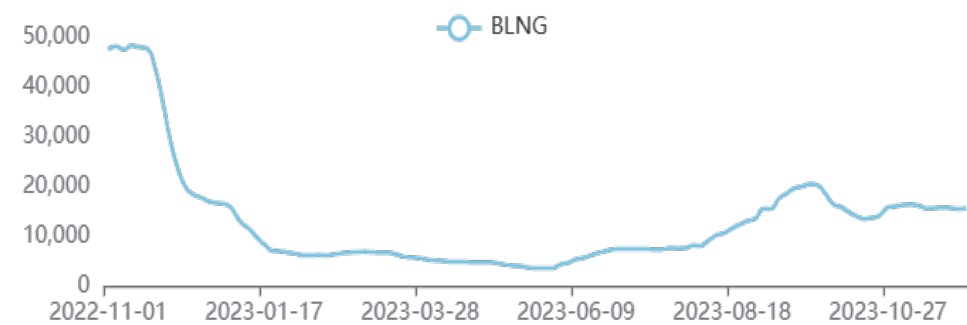
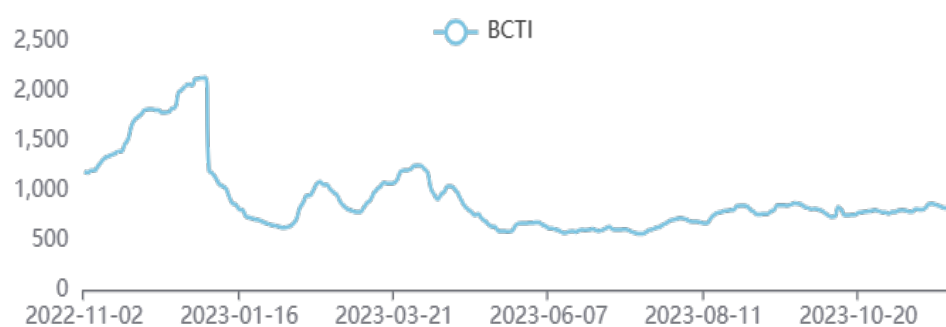
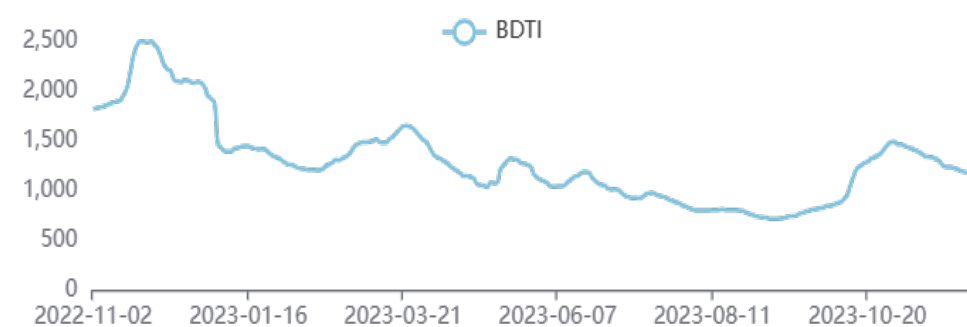
波罗的海干散货指数Baltic Dry Index

Type	PI	WoW	W%	M%	y%
BDI	3192	1090.0	51.86	118.33	138.57
BCI	6237	2852.0	84.25	192.41	297.26
BPI	2341	277.0	13.42	61.67	46.13
BSI	1489	210.0	16.42	35.24	27.81
BHSI	773	103.0	15.37	21.92	4.18



能源运价指数Energy Shipping Index

Type	PI	WoW	W%	M%	y%
BDTI	1172	-61.0	-4.95	-20.0	-48.14
BCTI	833	4.0	0.48	6.66	-53.88
BLNG	15654	5.0	0.03	-3.86	-32.83
BLPG	13930	-1094.0	-7.28	-3.88	4.56



第四部分 运力分布 SUPPLY DISTRIBUTION

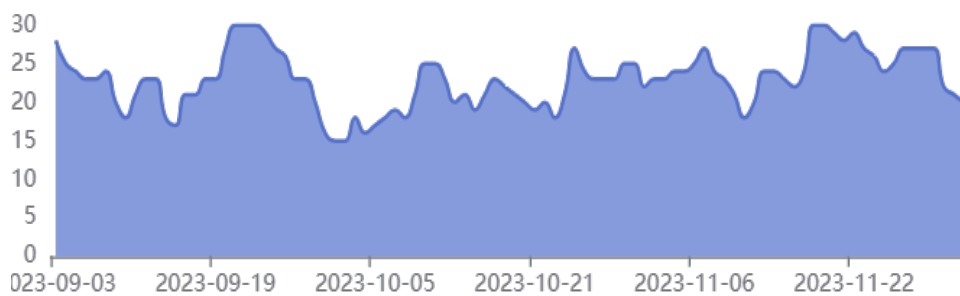


好望角型散货船 Capesize

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.

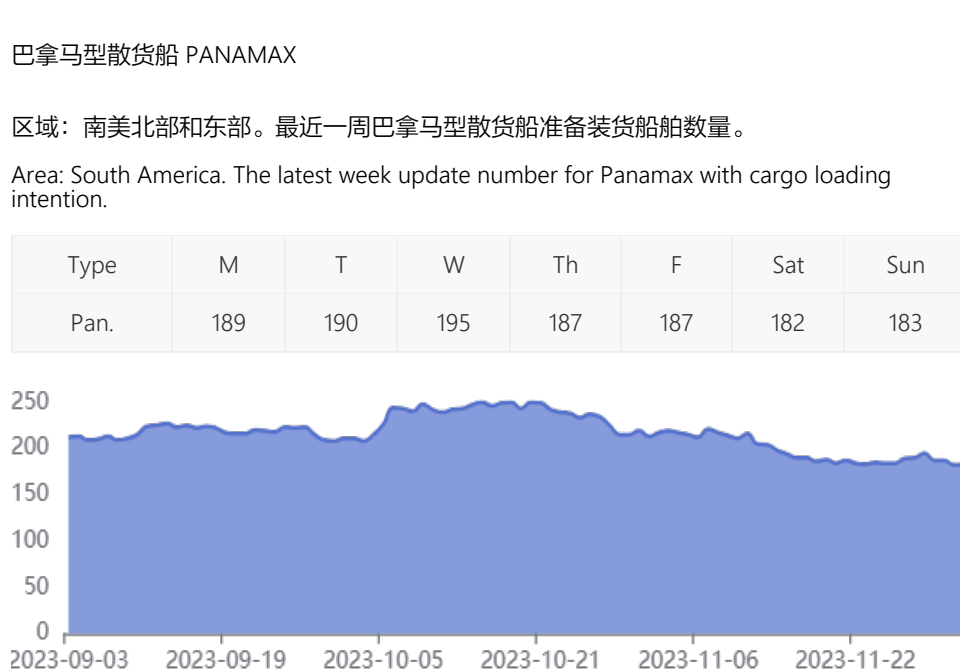
Type	M	T	W	Th	F	Sat	Sun
Cape	27	27	27	27	22	21	20



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	27	29	35	31	31	26	24

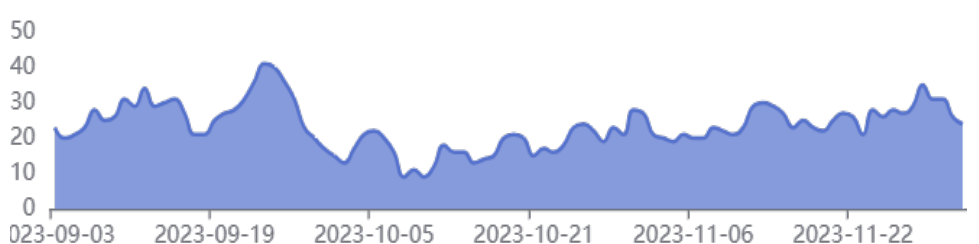
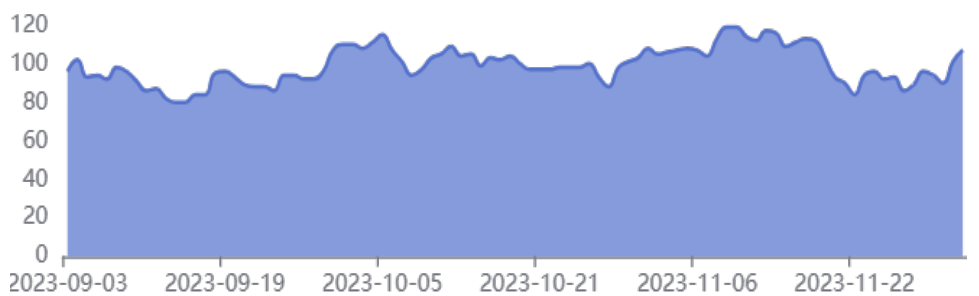


2023-09-03 2023-09-19 2023-10-05 2023-10-21 2023-11-06 2023-11-22

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	86	89	96	94	90	101	107



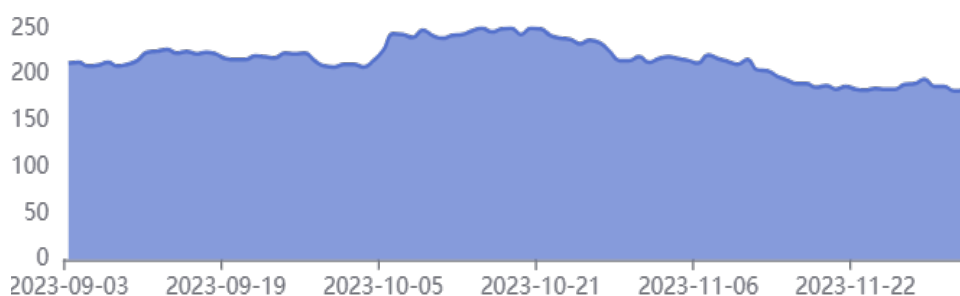
2023-09-03 2023-09-19 2023-10-05 2023-10-21 2023-11-06 2023-11-22

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.	189	190	195	187	187	182	183

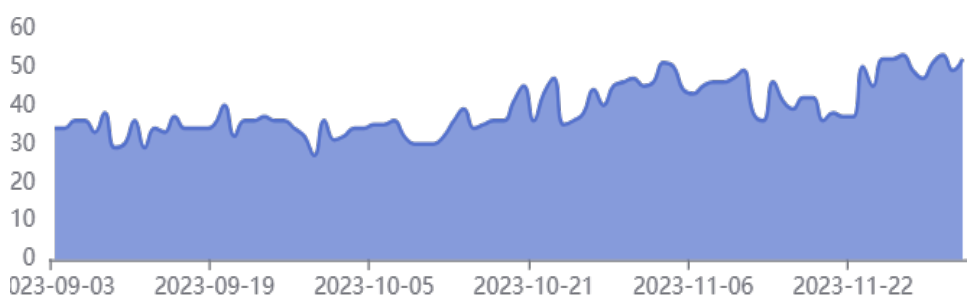


2023-09-03 2023-09-19 2023-10-05 2023-10-21 2023-11-06 2023-11-22

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.	37	34	39	41	49	42	44

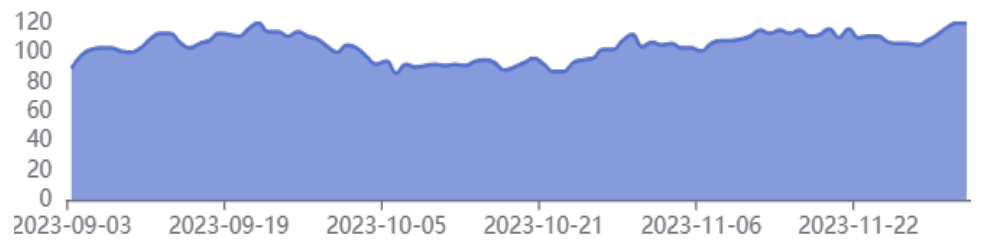


2023-09-03 2023-09-19 2023-10-05 2023-10-21 2023-11-06 2023-11-22

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.	106	105	108	112	117	120	120

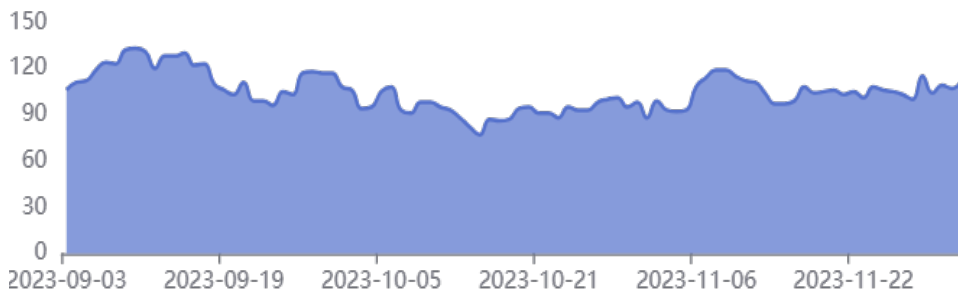


超大灵便型散货 SUPRAMAX

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.

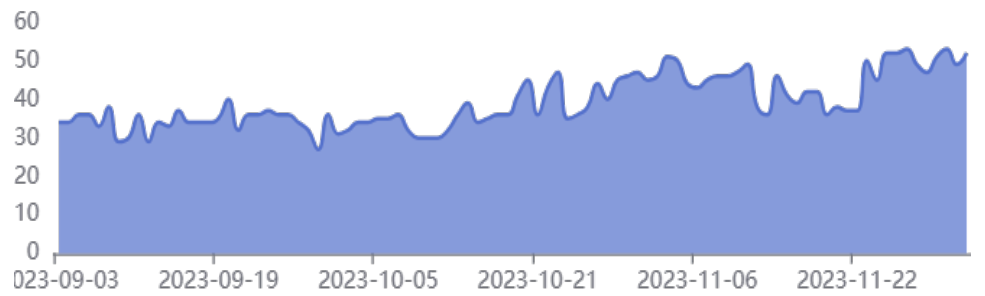
Type	M	T	W	Th	F	Sat	Sun
SMX	103	100	115	104	109	107	112



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.

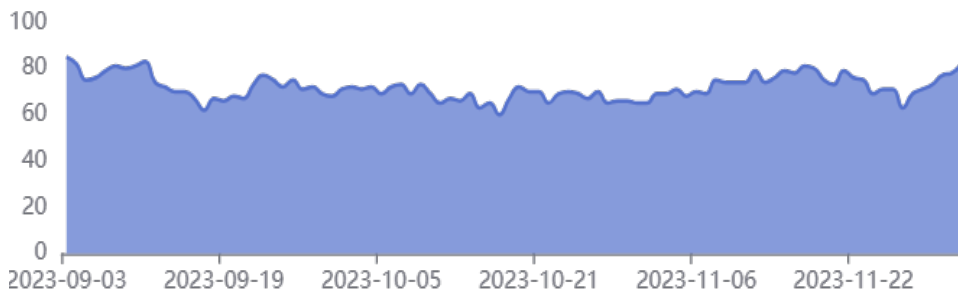
Type	M	T	W	Th	F	Sat	Sun
SMX	53	49	47	51	53	49	52



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.

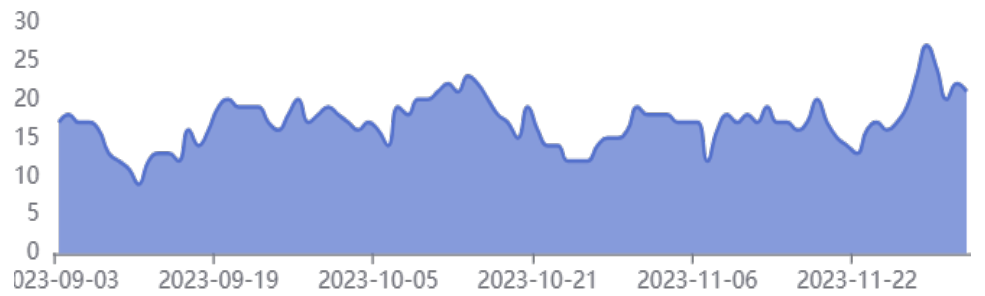
Type	M	T	W	Th	F	Sat	Sun
SMX	19	23	27	24	20	22	21



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.

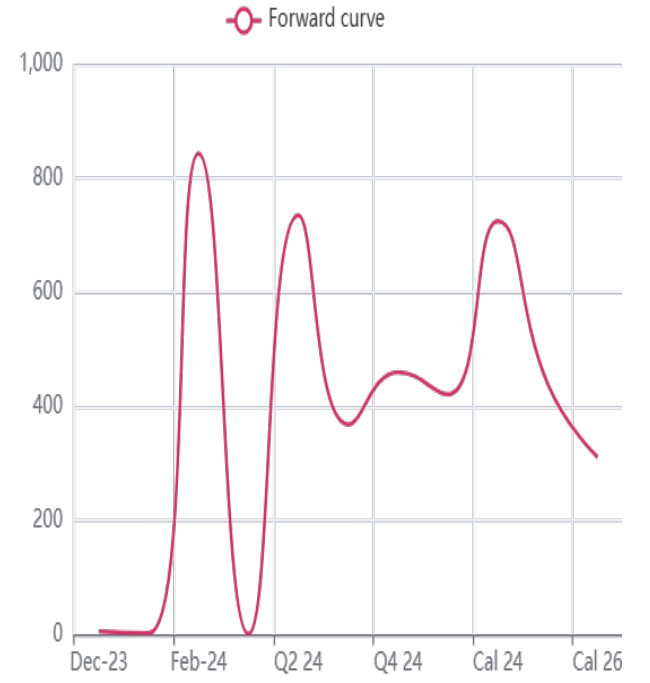
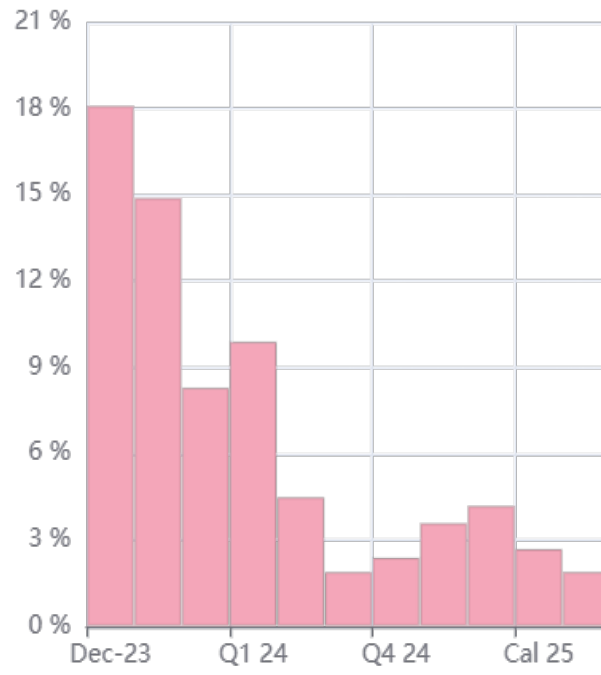
Type	M	T	W	Th	F	Sat	Sun
SMX	63	69	71	73	77	78	82



第五部分 远期运价协议 FFA

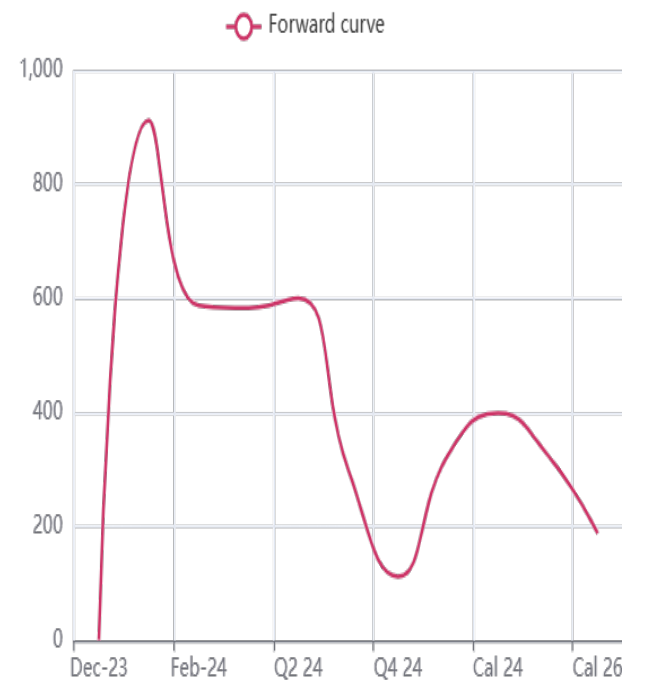
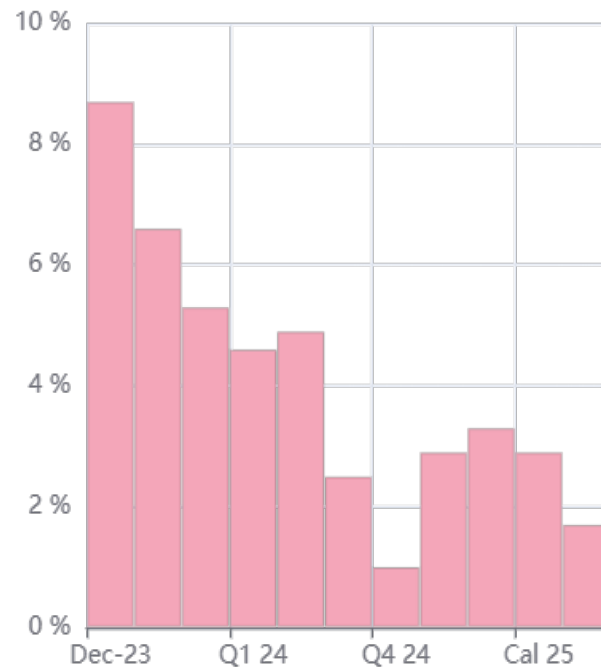
好望角型散货船Capesize

5TC	\$/day	WoW	
Dec-23	38,800.00	5943.0	18.1 %
Jan-24	20,686.00	2686.0	14.9 %
Feb-24	11,000.00	843.0	8.3 %
Q1 24	14,827.33	1334.67	9.9 %
Q2 24	17,139.00	735.0	4.5 %
Q3 24	19,600.00	368.0	1.9 %
Q4 24	19,921.00	460.0	2.4 %
Q1 25	12,050.00	421.0	3.6 %
Cal 24	17,871.83	724.42	4.2 %
Cal 25	16,871.00	439.25	2.7 %
Cal 26	16,750.00	311.0	1.9 %



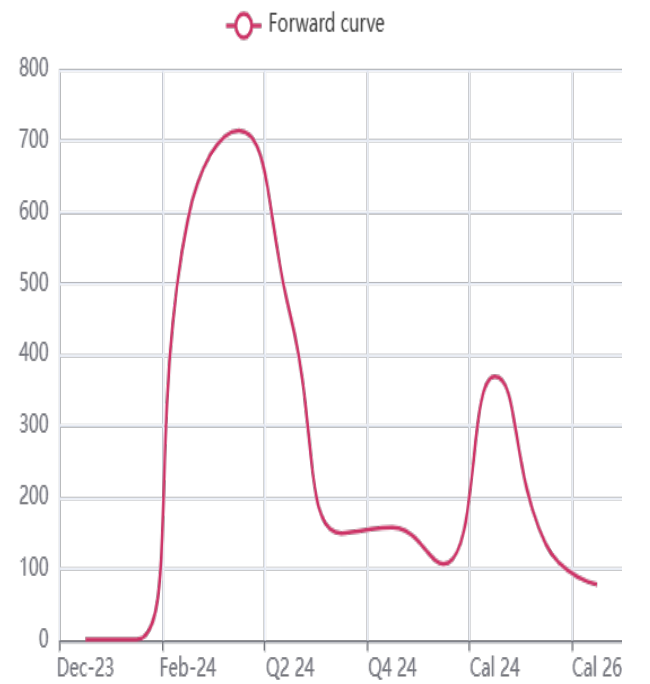
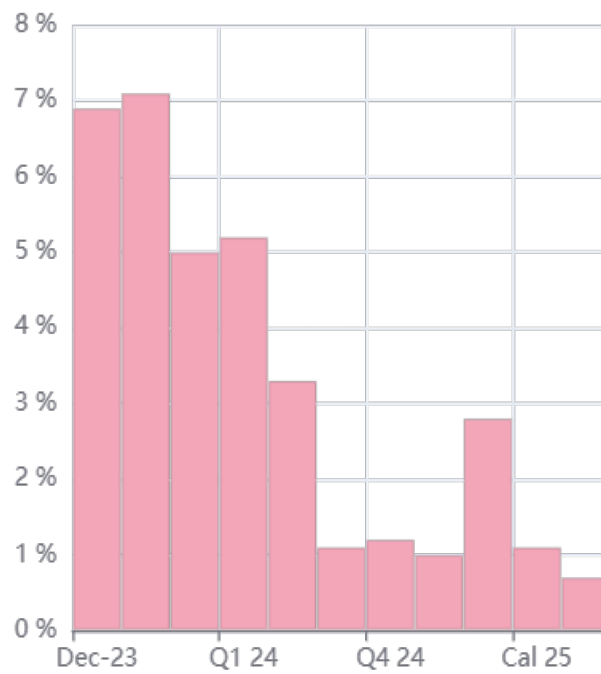
灵便型散货船Handysize

7TC	\$/day	WoW	
Dec-23	16,038.00	1288.0	8.7 %
Jan-24	14,700.00	912.0	6.6 %
Feb-24	11,625.00	587.0	5.3 %
Q1 24	13,233.33	583.0	4.6 %
Q2 24	12,850.00	600.0	4.9 %
Q3 24	12,300.00	300.0	2.5 %
Q4 24	11,750.00	112.0	1.0 %
Q1 25	11,663.00	325.0	2.9 %
Cal 24	12,533.33	398.75	3.3 %
Cal 25	11,663.00	325.0	2.9 %
Cal 26	11,388.00	188.0	1.7 %



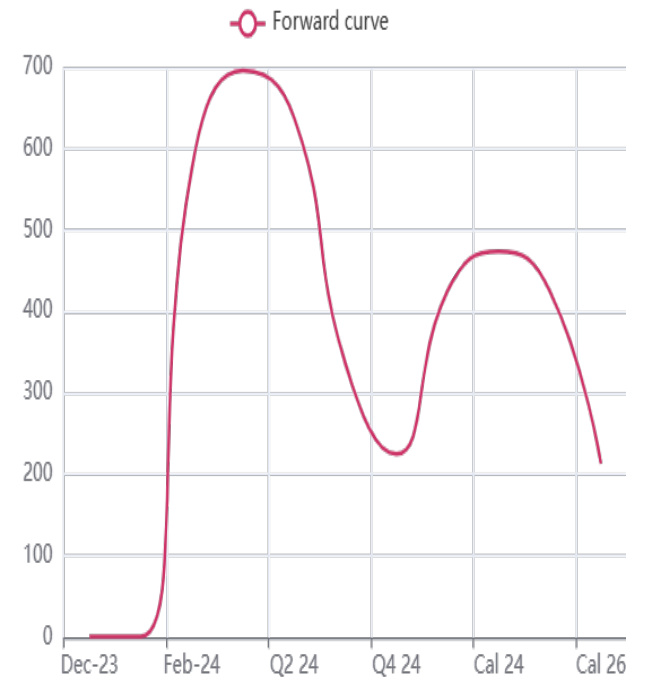
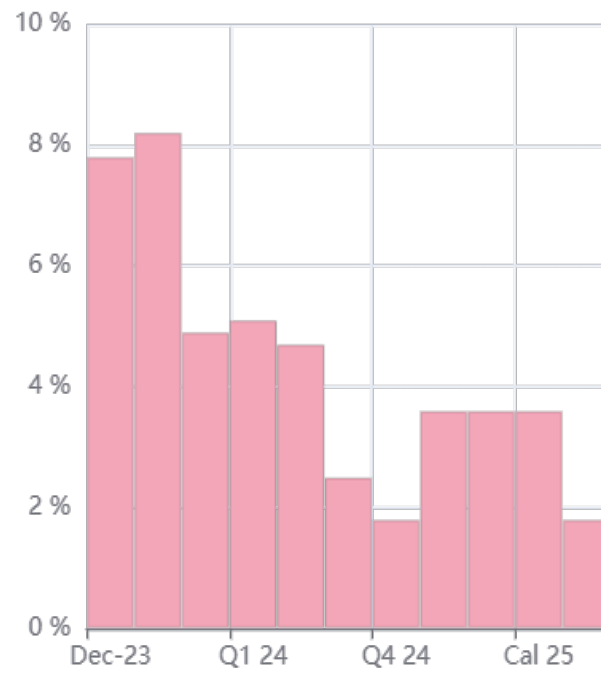
巴拿马型散货船Panamax

4TC	\$/day	WoW	
Dec-23	19,557.00	1257.0	6.9 %
Jan-24	16,296.00	1078.0	7.1 %
Feb-24	12,446.00	589.0	5.0 %
Q1 24	14,377.00	714.0	5.2 %
Q2 24	14,393.00	457.0	3.3 %
Q3 24	13,386.00	150.0	1.1 %
Q4 24	13,029.00	158.0	1.2 %
Q1 25	10,893.00	107.0	1.0 %
Cal 24	13,796.25	369.75	2.8 %
Cal 25	12,271.00	135.0	1.1 %
Cal 26	11,964.00	78.0	0.7 %



超大灵便型散货船Supramax

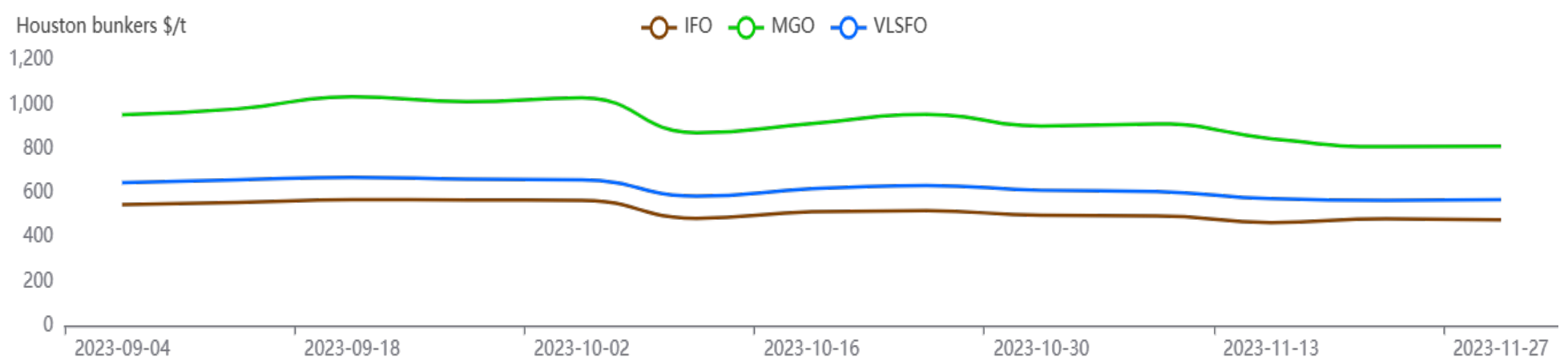
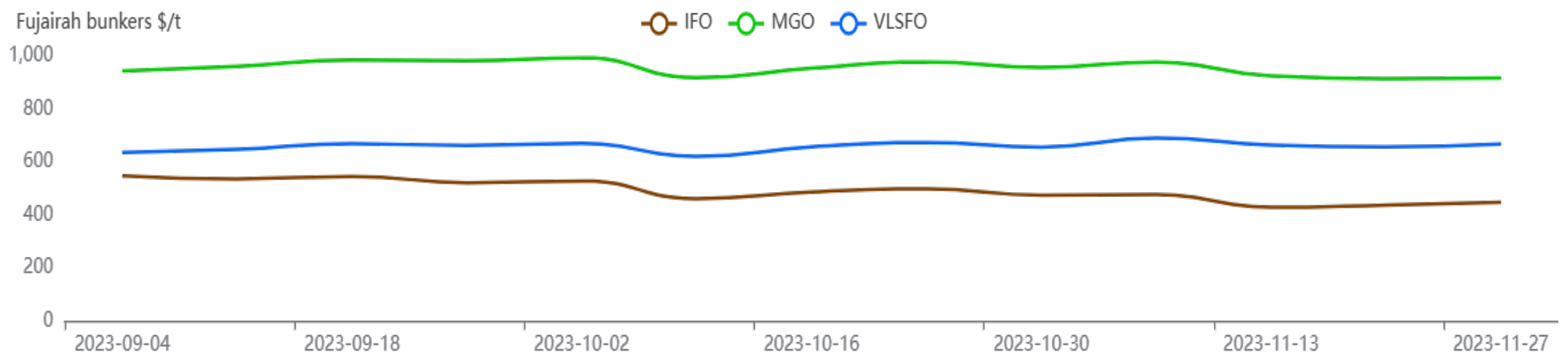
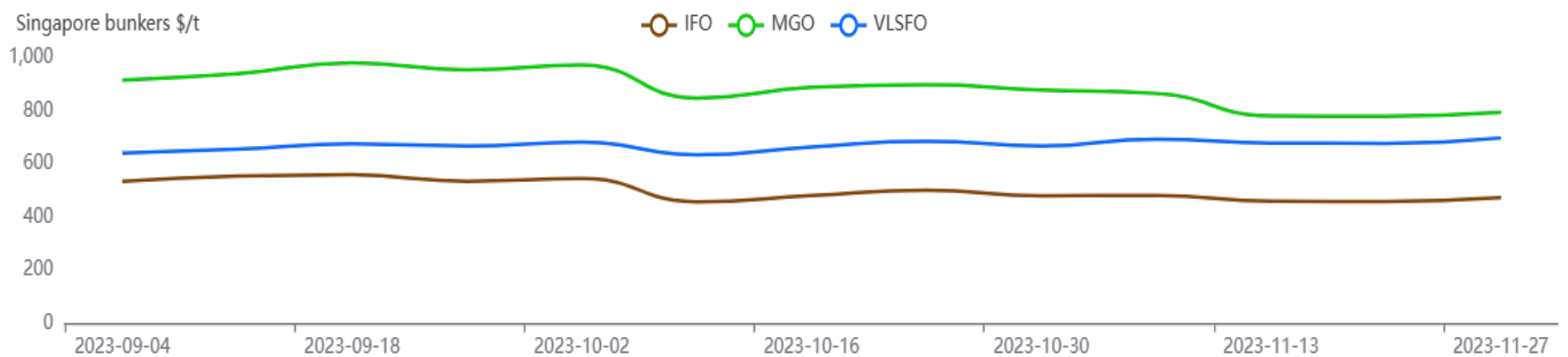
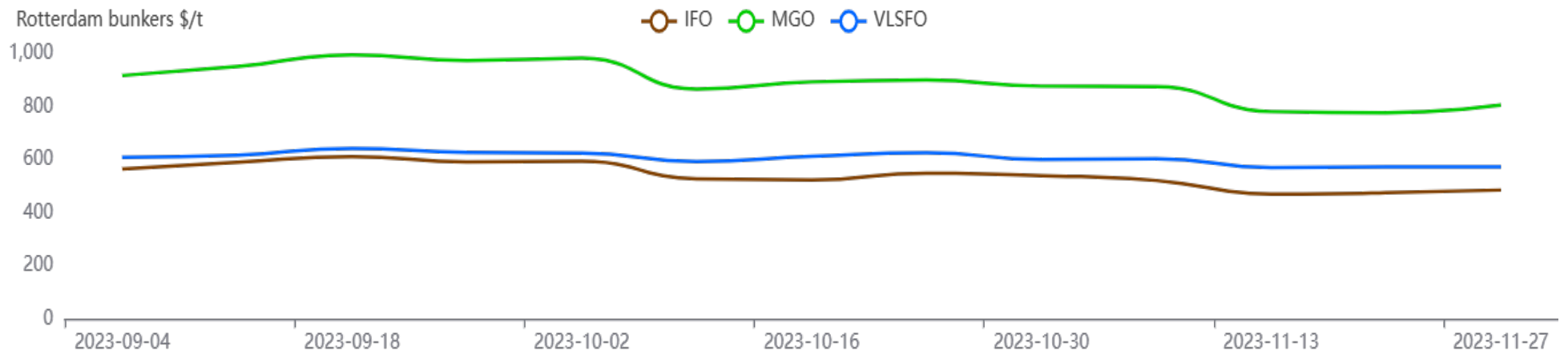
10TC	\$/day	WoW	
Dec-23	18,563.00	1350.0	7.8 %
Jan-24	16,483.00	1245.0	8.2 %
Feb-24	12,425.00	575.0	4.9 %
Q1 24	14,361.00	695.67	5.1 %
Q2 24	14,267.00	638.0	4.7 %
Q3 24	13,700.00	337.0	2.5 %
Q4 24	12,742.00	225.0	1.8 %
Q1 25	12,325.00	425.0	3.6 %
13,767.50	Cal 24	473.92	3.6 %
Cal 25	12,325.00	425.0	3.6 %
Cal 26	12,038.00	213.0	1.8 %



第六部分 燃油价格 BUNKER PRICE

MP	LO	HO	MO	SP	WoW	W%	M%
Singapore	671.0	482.5	850.5	188.5	-19.0	-9.16	N/A
Rotterdam	698.0	473.5	795.0	224.5	5.5	2.51	19.41
Fujairah	574.0	486.0	806.5	88.0	-9.5	-9.74	44.26
Houston	668.0	448.5	917.0	219.5	-1.0	-0.45	20.94

(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		215.86	-3.5	-1.6	-4.61	-27.63
Maize		223.65	-1.93	-0.86	-5.66	-28.51
Soybeans		260.14	-1.35	-0.52	2.26	-14.53
Rice		246.97	2.36	0.96	2.07	34.19
Barley		217.49	-2.05	-0.93	-1.97	-31.22
Energy		Index	+/-	Weekly	Monthly	YTD
Crude Oil	USD/Bbl	75.06	-1.9	-2.47	-10.71	-6.23
Brent	USD/Bbl	80.1	-1.37	-1.68	-10.24	-8.37
Natural Gas	USD/MMBtu	2.74	-0.16	-5.52	-18.21	-56.23
Gasoline	USD/Gal	2.16	-0.04	-1.82	-6.09	-10.0
Heating Oil	USD/Gal	2.81	0.0	0.0	-6.95	-19.48
Ethanol	USD/Gal	1.88	0.0	0.0	-17.9	-27.41
Naphtha	USD/T	625.71	-1.05	-0.17	-3.25	-7.5
Propane	USD/Gal	0.64	0.0	0.0	-7.25	-25.58
Uranium	USD/Lbs	80.25	6.25	8.45	9.93	58.28
Methanol	CNY/T	2403.0	-69.0	-2.79	-2.08	-9.76
TTF Gas	EUR/MWh	44.98	-1.7	-3.64	-16.39	-60.97
UK Gas	GBP/thm	115.45	-3.42	-2.88	-14.33	-57.24
Industrial		Index	+/-	Weekly	Monthly	YTD
Copper	USD/Lbs	3.77	0.02	0.53	3.29	4.14
Coal	USD/T	122.0	-1.3	-1.05	-9.76	-64.48
Steel	CNY/T	3944.0	-8.0	-0.2	6.39	5.77
Iron Ore	USD/T	136.0	3.5	2.64	12.86	36.68
Aluminum	USD/T	2232.0	-3.5	-0.16	-0.07	-8.15
Iron Ore Fe 62%	USD/T	2232.0	-3.5	-0.16	-0.07	-8.15
Metals		Index	+/-	Weekly	Monthly	YTD
Gold	USD/t.oz	2012.4	33.1	1.67	0.89	15.43
Silver	USD/t.oz	24.71	1.12	4.75	6.97	18.86
Platium	USD/t.oz	934.2	29.6	3.27	3.14	-3.63
Currencies		Index	+/-	Weekly	Monthly	YTD
EUR/USD		1.09	0.0	0.0	2.83	5.83
USD/CNY		7.16	-0.01	-0.14	-2.32	-0.14

第八部分 本周话题 WEEKLY TOPIC

EU ETS欧盟排放交易体系

EU ETS是欧盟排放限额与交易的体系，2005年启动，分阶段运作，旨在通过对某些行业的温室气体排放设定限制来减少温室气体的排放。2023年5月16日，欧盟将航运正式纳入EU ETS，船舶经营者将被要求上交他们排放的每吨二氧化碳的配额。欧盟排放交易体系中的碳定价是基于船舶而不是货物来确定的。除了对在欧盟国家之间航行的船只实行碳定价外，该法律还具有域外适用性。航运公司有义务为以下排放购买配额：从欧盟港口到非欧盟港口的航次排放量的50%，反之亦然。欧盟港口之间的航行排放100%。在欧盟港口停靠的船舶排放100%。由于将排放交易体系扩展到海运活动，增加了航运成本，代表们担心转运活动转移到欧盟以外的风险。为了减轻这种碳泄漏情况，该法律也专门针对欧盟附近转运份额高的非欧盟港口纳入监控。将航运纳入欧盟排放交易体系旨在采用经济措施可持续减少温室气体排放。航运碳定价将分阶段实施，航运公司将被要求按照以下时间表提交相当于其排放量的一部分配额：到2024年企业必须提交其已核实排放量的40%的配额；到2025年企业必须提交其核定排放量的70%的配额；从2026年起企业必须为所有已核实的排放量提交配额。此外，从2026年1月1日开始，碳排放交易体系的规定将扩大到包括两种额外的温室气体的排放：氮氧化物和甲烷。根据欧盟排放交易体系，最终还是船东负责获取EUA，其对应的公司可能还需要设立要求的账户，货主将要求包含欧盟配额成本和不包含两种运费价格，而船东会担心其申报的欧盟配额是否会因为重新调整而面临损失。欧盟排放交易体系拓展到航运，对航运将带来长远的影响，新造船和修船市场也会持续受益。The European Union Emissions Trading System is an emissions cap-and-trade system that aims to reduce greenhouse gas (GHG) emissions for certain sectors of the economy. Shipping was subsequently adopted and finalized by the system on May 16, 2023. As of 2024, ship operators will be required to surrender allowances for every ton of CO₂ they emit. Carbon pricing in the EU ETS is determined based on vessels rather than cargo. Shipping companies are obligated to purchase allowances for the following emissions: 50% of emissions from voyages departing from an EU port to a non-EU port and vice versa; 100% of emissions from voyages between EU ports; 100% of emissions from ships docked at an EU ports. Concerned about the risk of evasion and transshipment activities moving outside the EU. To mitigate this, the law specifically targets non-EU ports near the EU with a high share of transshipment. Shipping companies will be required to submit allowances equivalent to a portion of their emissions according to the following schedule: In 2024, companies must submit allowances for 40% of their verified emissions; In 2025, companies must submit allowances for 70% of their verified emissions; From 2026 onwards, companies must submit allowances for all their verified emissions. Starting from January 1st, 2026, the ETS regulations will expand to include emissions of two additional gases: nitrous oxide and methane. Under the EU ETS, it is ultimately the shipowners who are responsible for obtaining the EUA, and the expansion of the EU Emissions trading System to shipping will have a long-term impact on shipping.

