



2023年 第52周市场周报

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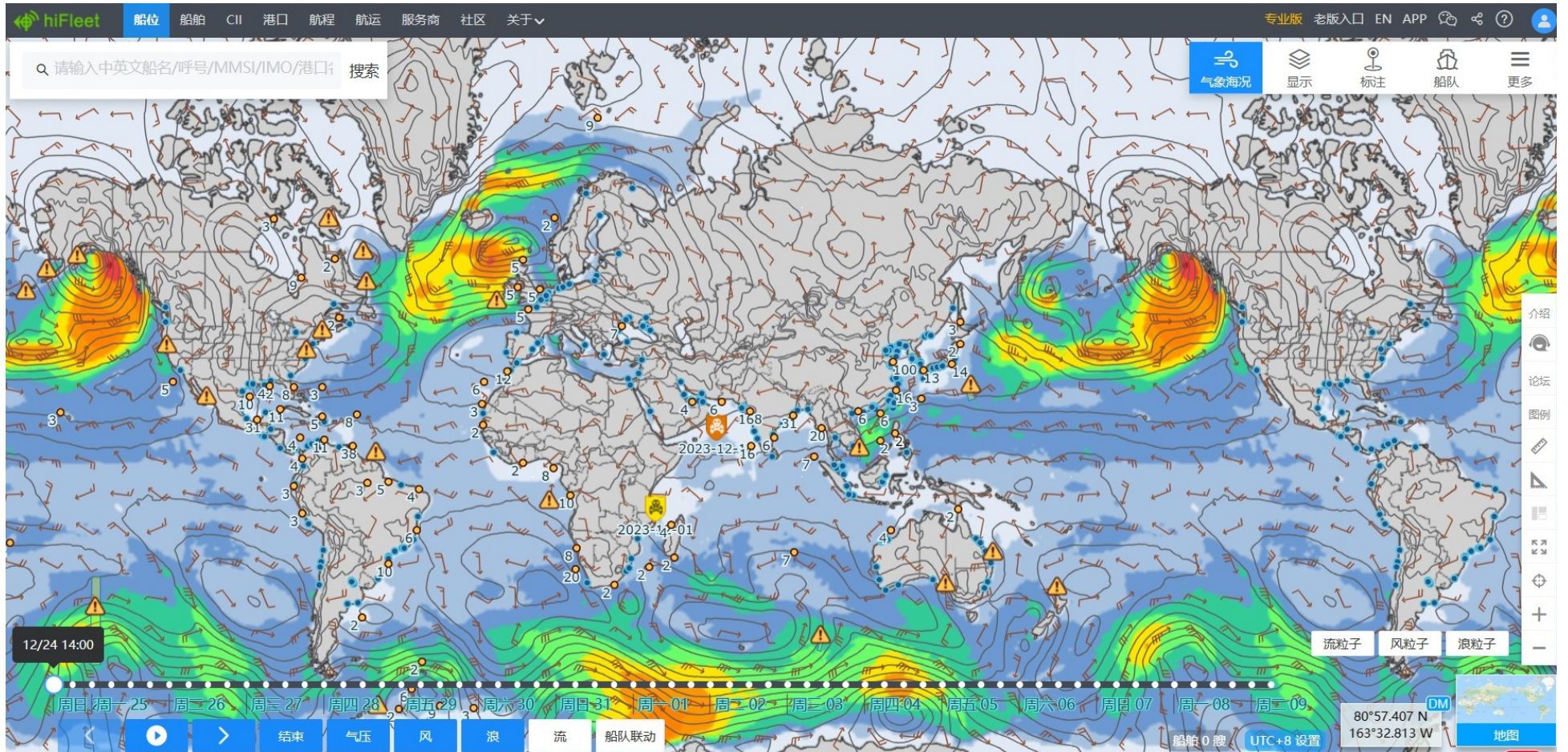
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本周话题 WEEKLY TOPIC

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835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 835 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

最近一周发生一起海盗劫持事件在12月14号阿拉伯海。当前一艘总载重量为 41600 吨的 Ruen号，目前停留在索马里东岸，该船确认已经被索马里海盗所劫持。The latest piracy hijacked reports within the week happened on 14th Dec in Arab Sea. M.V. Ruen, a 41,600-ton handymax found in east coastal waters of the Somalia, is confirmed to have been hijacked by Somali pirates.

其它 Others

无 Nil

航海气象 Meteorology

未来一周受东北低压和冷空气共同影响中国渤海、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米大浪；台湾海峡风力由7-8级降低到6-7级，台湾海峡洋面海浪可能经历4米大浪，南海大部海域风力维持在5-7级，海浪有时出现4米大浪。辽东湾最大浮冰范围30-40海里；渤海湾最大浮冰范围5-10海里，莱州湾最大浮冰范围5-15海里；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频繁且加强，相关海域海况正在变得恶劣。The coming week will be affected by low pressure and cold air in northeast China the wind in Bohai Sea, Yellow Sea and East Chia Sea will gradually strengthen from breeze to gale, and the seas in the relevant waters will see rough sea. The wind in the Taiwan Strait will ease from gale to breeze. The sea in the Taiwan Strait happens to experience very rough. In most of the South China Sea the wind maintains strong breeze and the sea sometimes see very rough. The maximum range of floating ice in Liaodong Bay is 30-40 nm. The maximum range of floating ice is 5-10 nm in Bohai Bay and 5-15 nm in Laizhou Bay. The maximum range of floating ice in the north of the Yellow Sea is 10-20 nautical miles. Low-pressure in the north of North Atlantic Ocean and Pacific is frequent, leading to deteriorating sea conditions.

海上事件 Marine Incidents

据报道，印尼一艘普通货船沉没，8名船员失踪。这艘8200载重吨的“环球视野”号(Vision Global, 1995年建造)于周二在东爪哇岛班让岛以南25海里处失踪。该船于12月17日离开图班，前往毛米尔国内港。共有13名海员被印尼船主Timur Mila Utama的300航道滚装船Niki Mila Utama(1992年建造)救出。Eight crew members are missing off Indonesia after reports that their general cargo ship sank. The 8,200-dwt Vision Global (built 1995) was lost on Tuesday, 25 nautical miles south of Panjang Island, East Java. The vessel had left Tuban on 17 December, destined for the domestic port of Maumere. A total of 13 seafarers were rescued by Indonesian owner Timur Mila Utama's 300-lane-metre ro-ro vessel Niki Mila Utama (built 1992).

备注 Remark

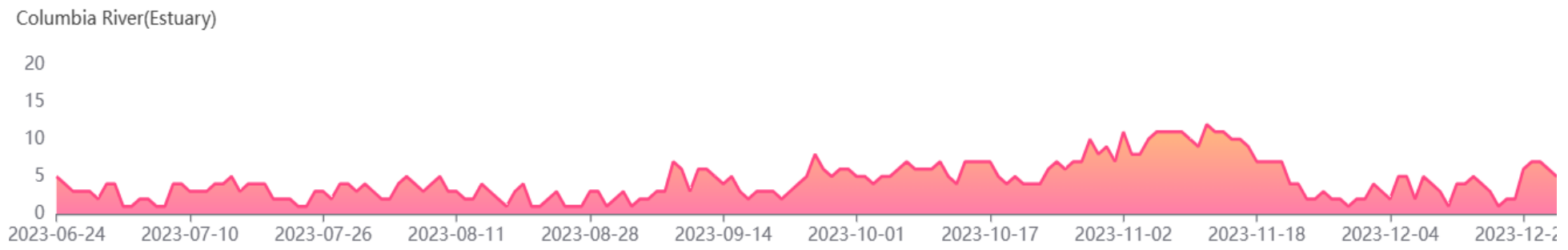
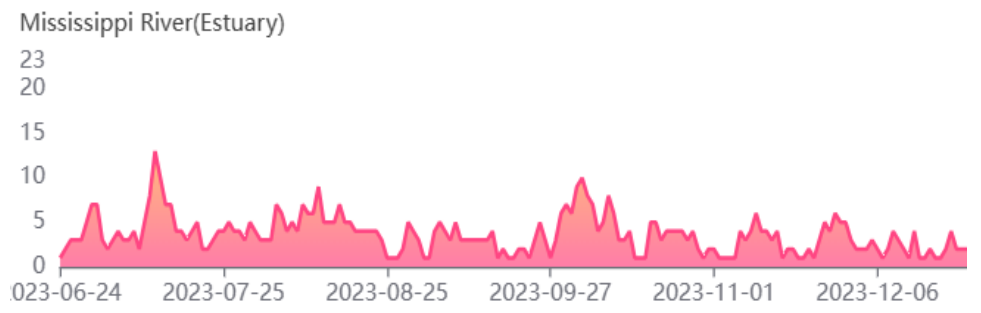
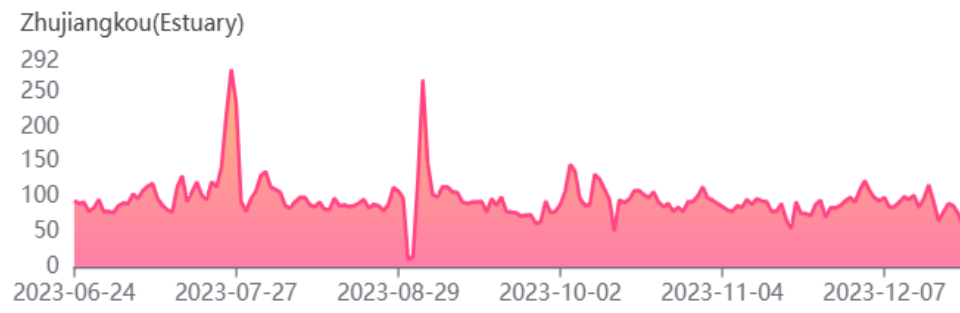
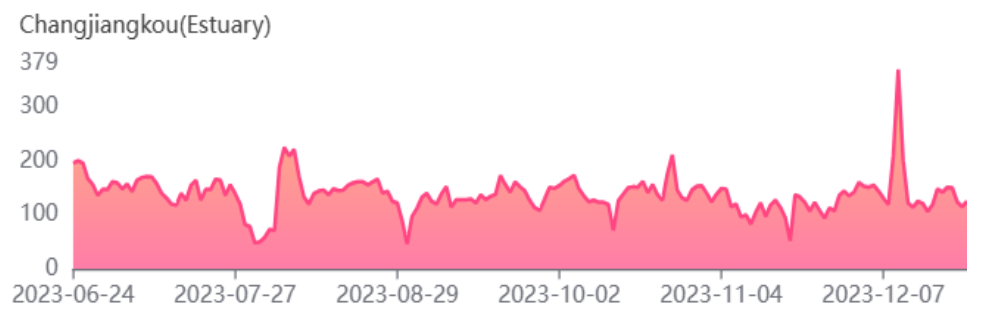
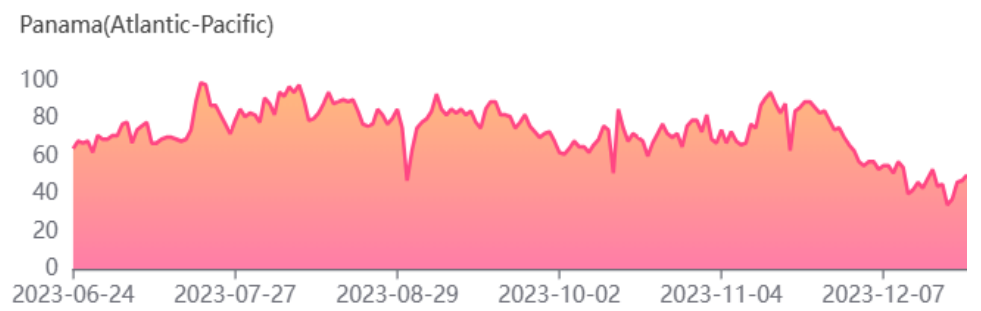
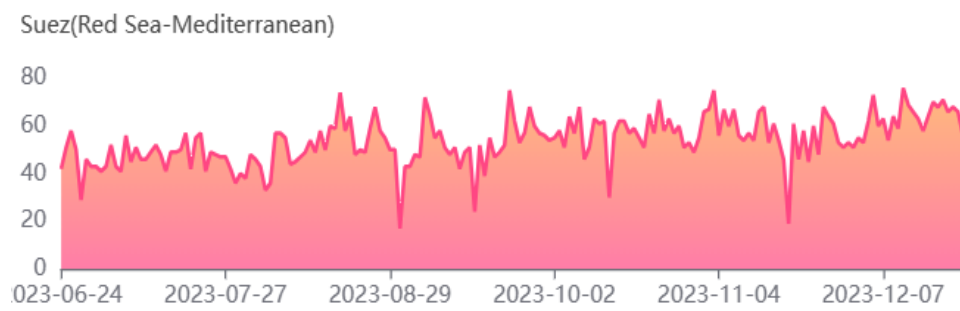
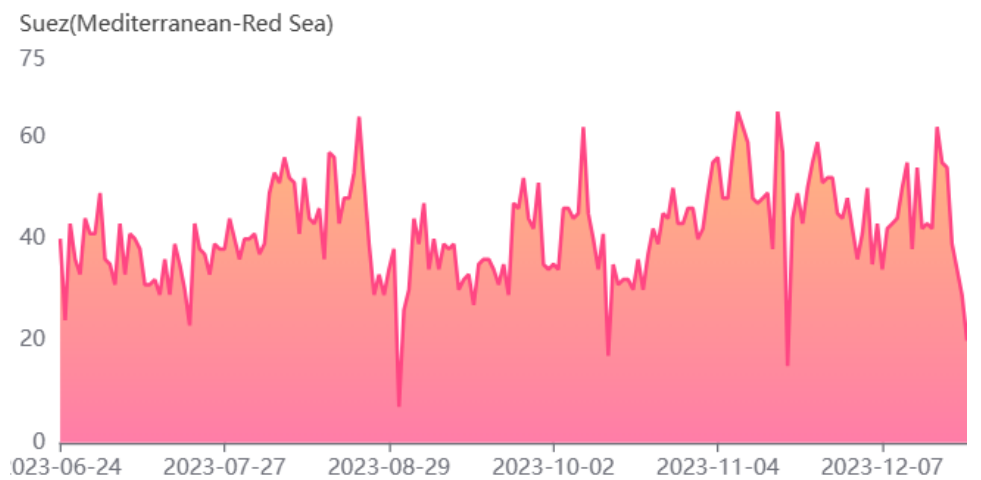
本报告数据截止时间为2023年12月24日北京时间17点；所有数据和或观点仅供参考，在任何情况下本公司及其员工不承担任何风险。The data deadline for this report is Beijing time 17 hours on December 24 of 2023; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

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	1783	-14	130
Miss.Riv.	2	74	2	16
CJK	125	4231	-203	798
Pa.Atlan.	50	1553	-27	-737
Colum.Riv.	5	102	11	-138
Suez.Med.	20	1268	-33	-175
Pa.Pac.	63	2051	-10	-297
ZJK	57	2638	-176	133

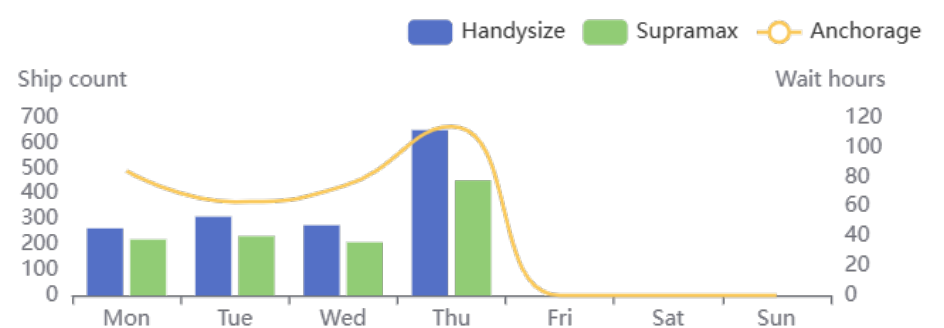


(P.N.-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

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

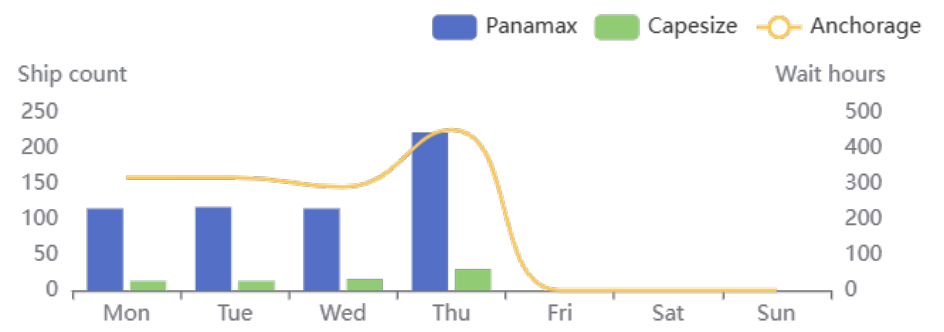
Type	M	T	W	Th	F	Sat	Sun
HDY	264	310	276	651	0	0	0
SMX	220	233	209	453	0	0	0
WT.h.	84	63.2	73.8	114	0.0	0.0	0.0



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

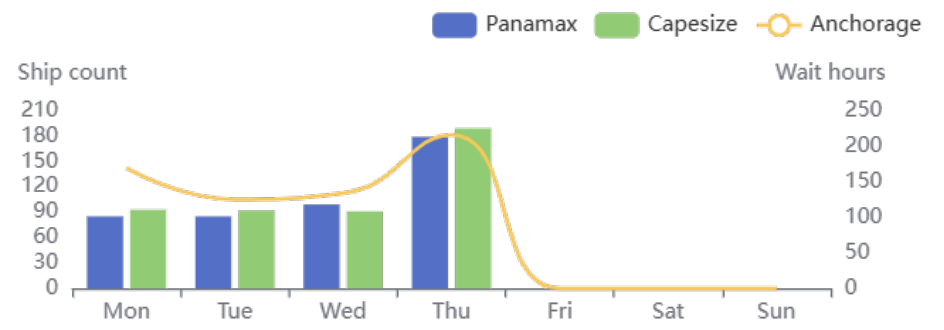
Type	M	T	W	Th	F	Sat	Sun
Pan.	115	117	115	222	0	0	0
Cap	13	13	16	30	0	0	0
WT.h.	317.2	317.2	290.8	452	0.0	0.0	0.0



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

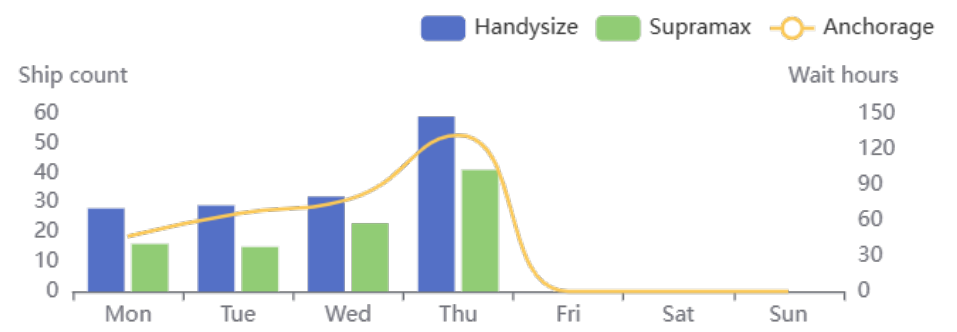
Type	M	T	W	Th	F	Sat	Sun
Pan.	85	85	99	179	0	0	0
Cap	93	92	91	189	0	0	0
WT.h.	169.55	125.2	133.9	215.8	0.0	0.0	0.0



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

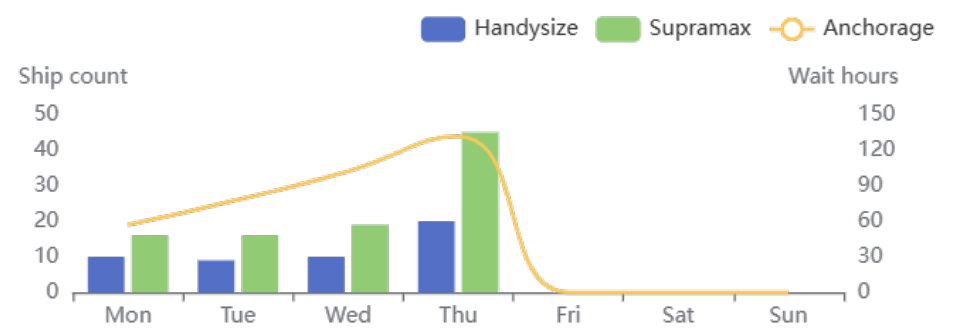
Type	M	T	W	Th	F	Sat	Sun
HDY	28	29	32	59	0	0	0
SMX	16	15	23	41	0	0	0
WT.h.	46.4	65.8	77.6	131.8	0.0	0.0	0.0



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

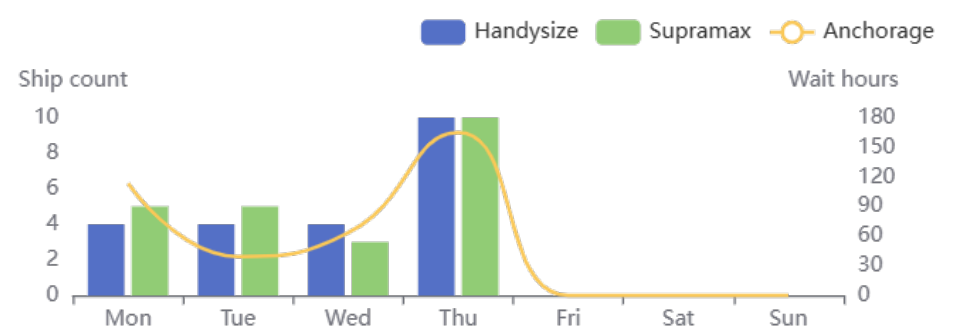
Type	M	T	W	Th	F	Sat	Sun
HDY	10	9	10	20	0	0	0
SMX	16	16	19	45	0	0	0
WT.h.	56.9	78.2	102.2	131.6	0.0	0.0	0.0



最近一周拉普拉特河区域超大型散货船和灵便型散货船舶锚泊数量和平均锚泊时长

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

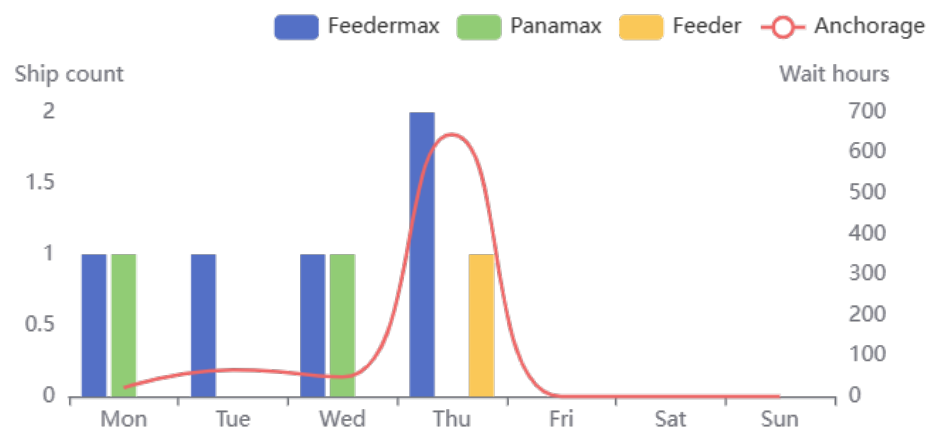
Type	M	T	W	Th	F	Sat	Sun
HDY	4	4	4	10	0	0	0
SMX	5	5	3	10	0	0	0
WT.h.	113.4	39.4	63.4	165	0.0	0.0	0.0



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

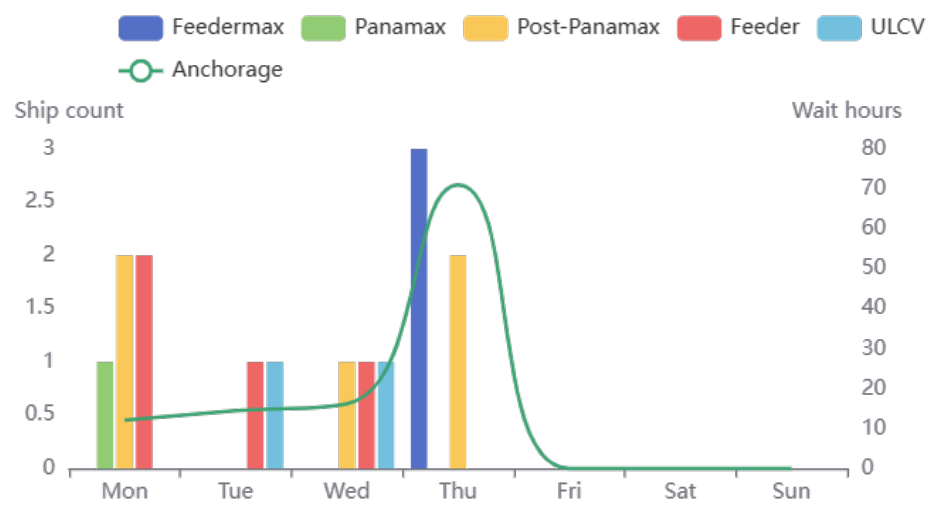
Type	M	T	W	Th	F	Sat	Sun
F.ma.	1	1	1	2	0	0	0
Pan.	1	0	1	0	0	0	0
PPx	0	0	0	0	0	0	0
NPx	0	0	0	0	0	0	0
Fd	0	0	0	1	0	0	0
WT.h.	21.25	65.9	47.8	646	0.0	0.0	0.0
Ulcw	0	0	0	0	0	0	0



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

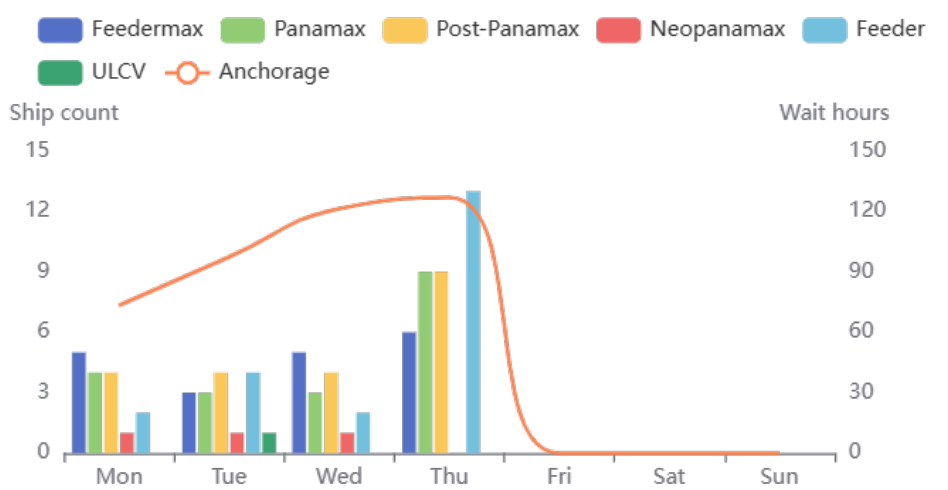
Type	M	T	W	Th	F	Sat	Sun
F.ma.	0	0	0	3	0	0	0
Pan.	1	0	0	0	0	0	0
PPx	2	0	1	2	0	0	0
NPx	0	0	0	0	0	0	0
Fd	2	1	1	0	0	0	0
Ulcw	0	1	1	0	0	0	0
WT.h.	12.1	14.45	16.2	71	0.0	0.0	0.0



最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

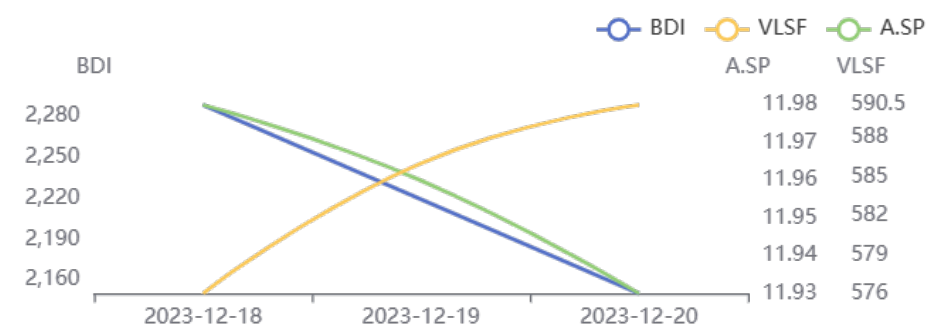
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

Type	M	T	W	Th	F	Sat	Sun
F.ma.	5	3	5	6	0	0	0
Pan.	4	3	3	9	0	0	0
PPx	4	4	4	9	0	0	0
NPx	1	1	1	0	0	0	0
Fd	2	4	2	13	0	0	0
Ulcw	0	1	0	0	0	0	0
WT.h.	73.4	97.4	121.4	127	0.0	0.0	0.0



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

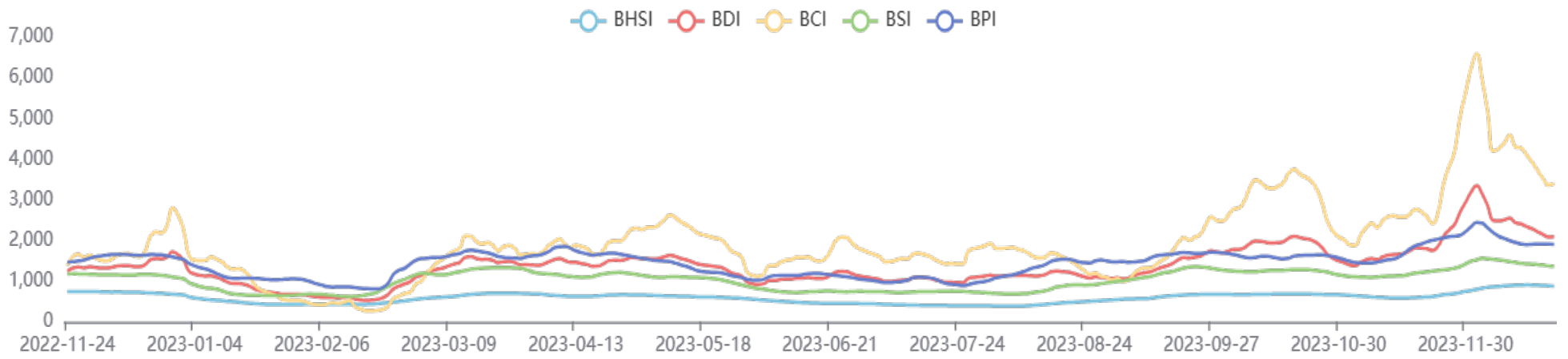
Type	M	T	W	Th	F	Sat	Sun
BDI	1906	1915	1917	1915	1909		
VLSF	576	586	590.5	592.5	594		
A.SP	11.98	11.96	11.93				



第三部分 航运市场 SHIPPING MARKET

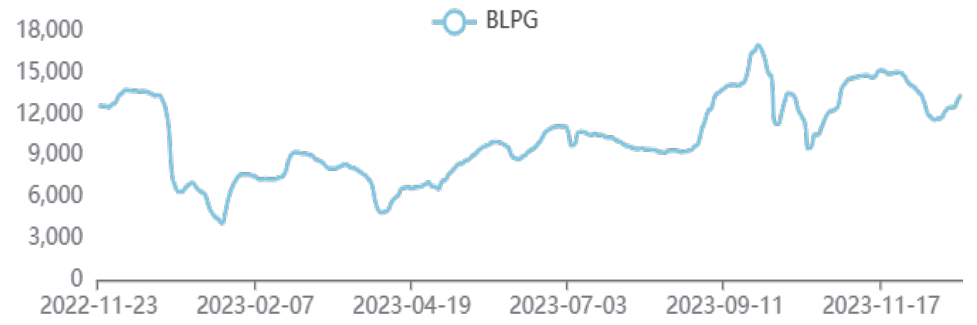
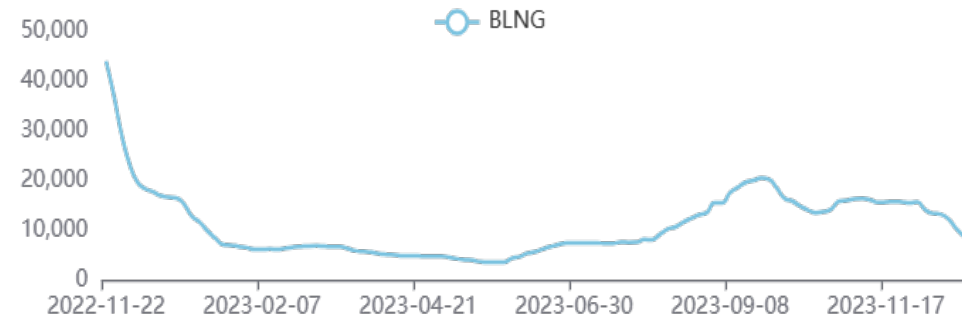
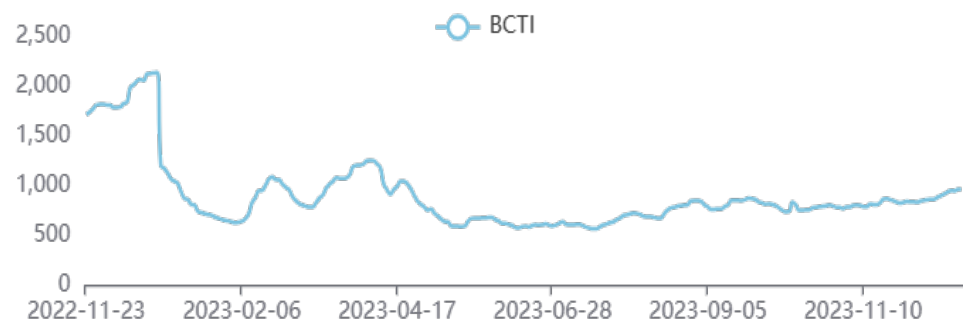
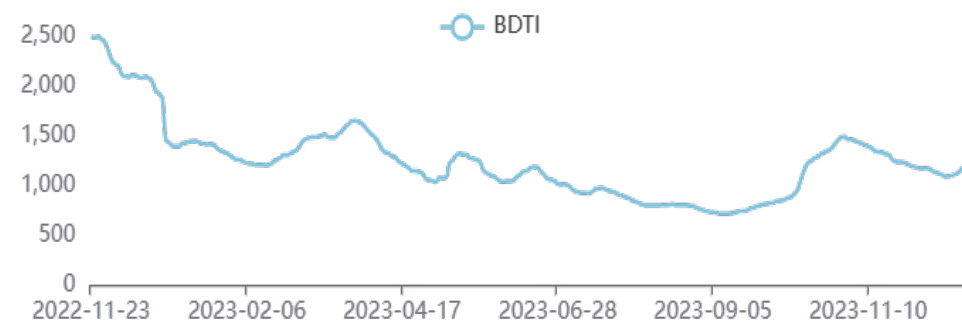
波罗的海干散货指数Baltic Dry Index

Type	PI	WoW	W%	M%	y%
BDI	2094	-254.0	-10.82	-0.38	26.91
BCI	3398	-715.0	-17.38	0.38	29.4
BPI	1909	9.0	0.47	-7.51	22.14
BSI	1369	-57.0	-4.0	7.04	26.41
BHSI	879	-29.0	-3.19	31.19	31.0

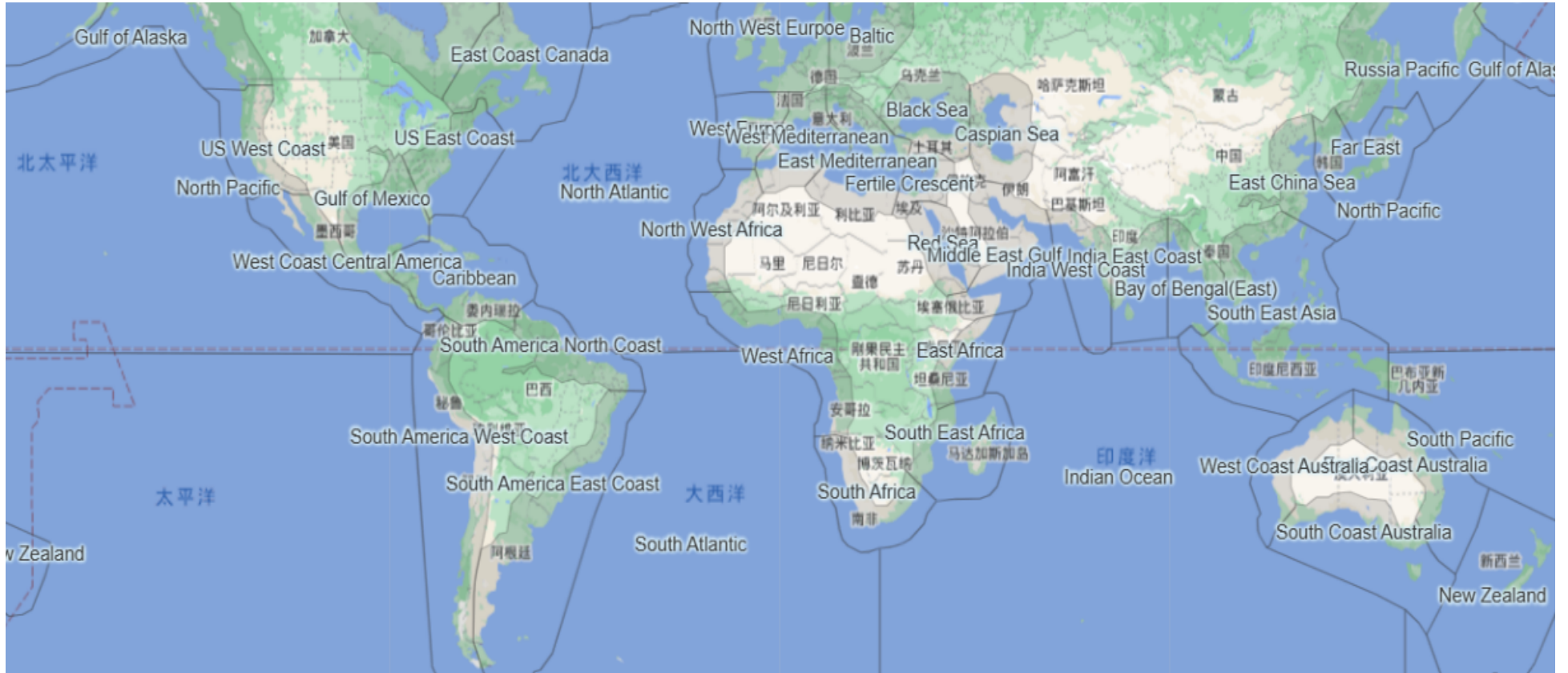


能源运价指数Energy Shipping Index

Type	PI	WoW	W%	M%	y%
BDTI	1200	97.0	8.79	-2.68	-35.93
BCTI	960	27.0	2.89	15.8	-55.04
BLNG	8708	-3511.0	-28.73	-44.35	-47.12
BLPG	13373	957.0	7.71	-10.99	22.07



第四部分 运力分布 SUPPLY DISTRIBUTION

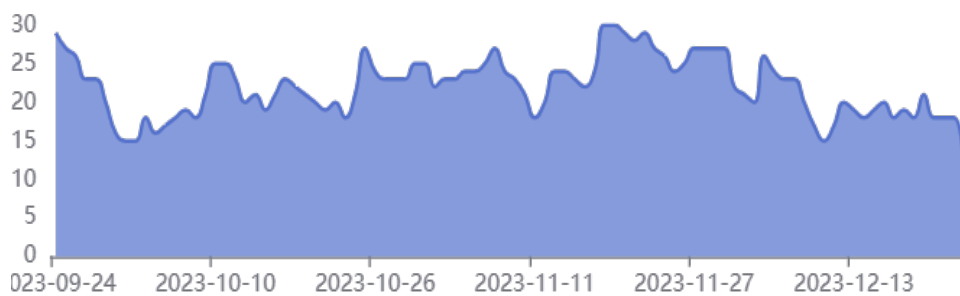


好望角型散货船 Capesize

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.

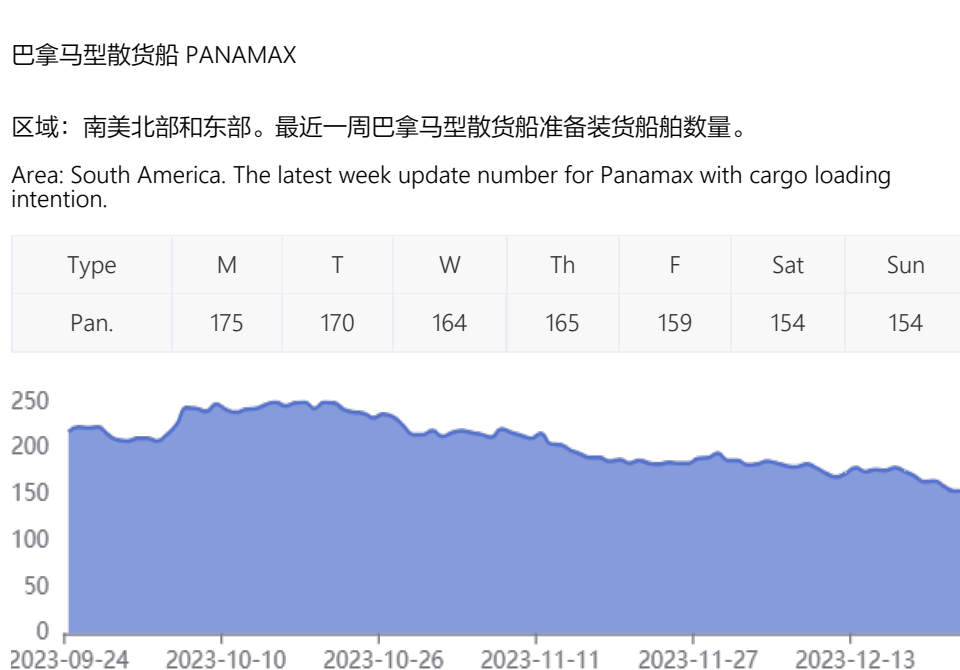
Type	M	T	W	Th	F	Sat	Sun
Cape	19	18	21	18	18	18	12



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	21	19	19	23	20	20	21

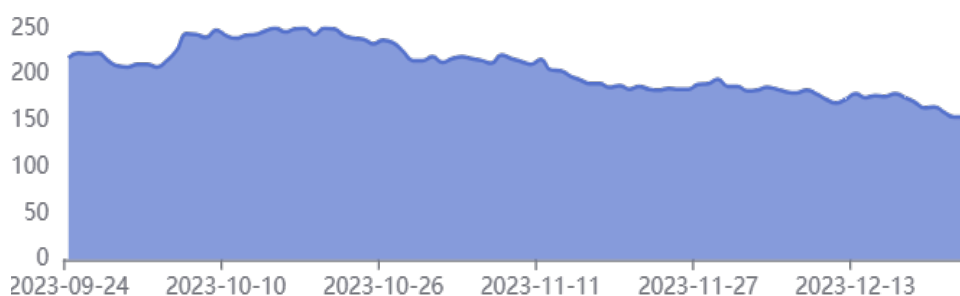


巴拿马型散货船 PANAMAX

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.

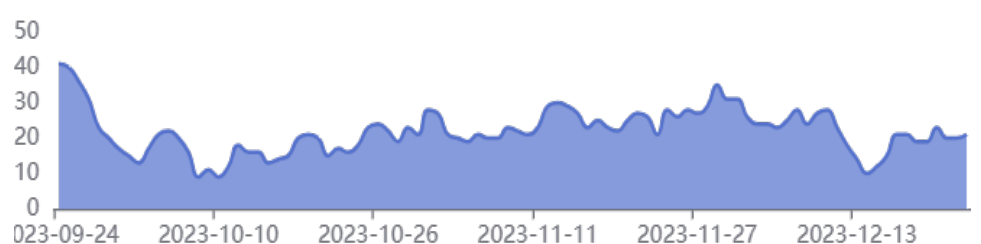
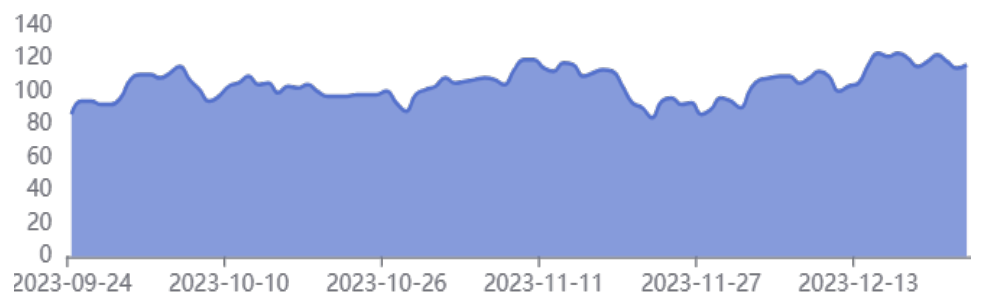
Type	M	T	W	Th	F	Sat	Sun
Pan.	175	170	164	165	159	154	154



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.

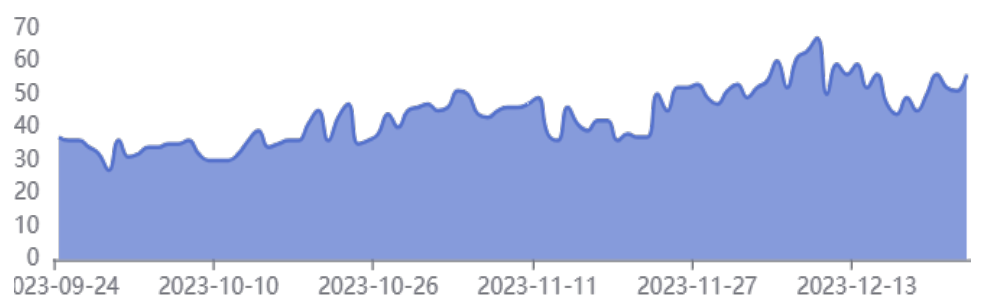
Type	M	T	W	Th	F	Sat	Sun
Cape	120	115	118	122	118	114	116



区域：黑海，最近一周巴拿马型散货船准备装货船舶数量。

Area: Black Sea, The latest week update number for Panamax with cargo loading intention.

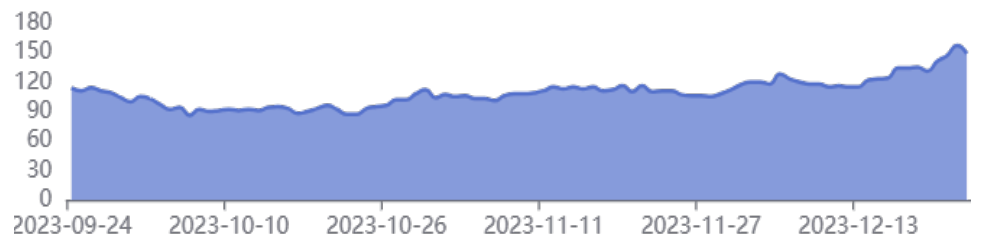
Type	M	T	W	Th	F	Sat	Sun
Pan.	49	51	51	55	51	47	48



区域：澳大利亚。最近一周巴拿马型散货船准备装货船舶数量。

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

Type	M	T	W	Th	F	Sat	Sun
Pan.	134	135	131	141	147	157	149

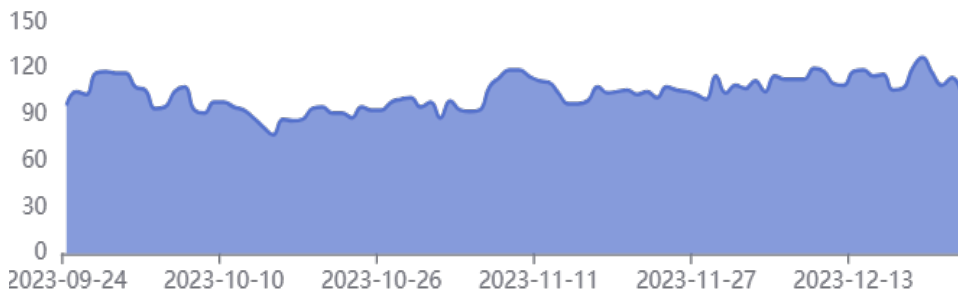


超大灵便型散货 SUPRAMAX

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.

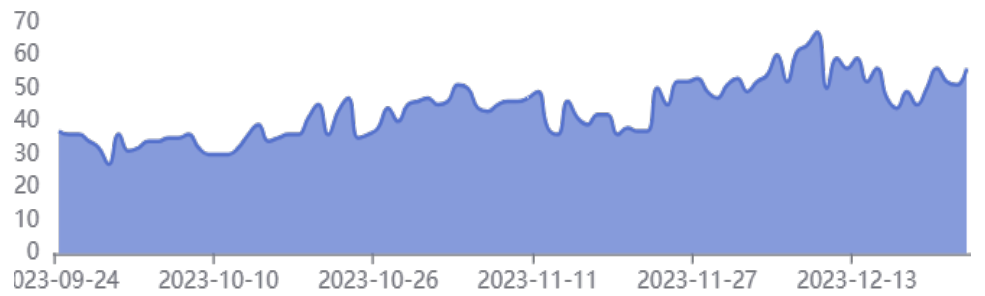
Type	M	T	W	Th	F	Sat	Sun
SMX	107	120	127	117	109	114	103



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.

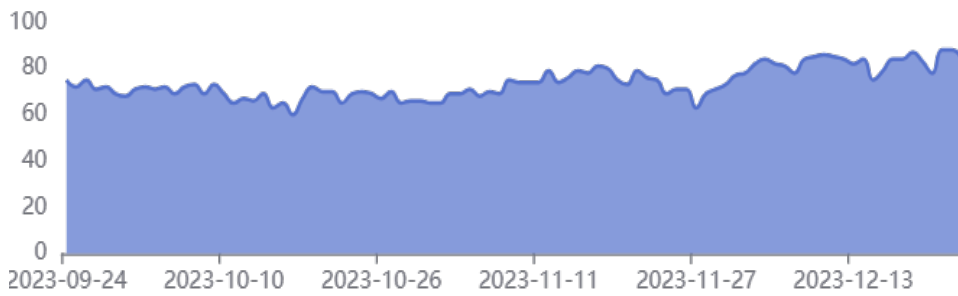
Type	M	T	W	Th	F	Sat	Sun
SMX	49	45	50	56	52	51	56



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.

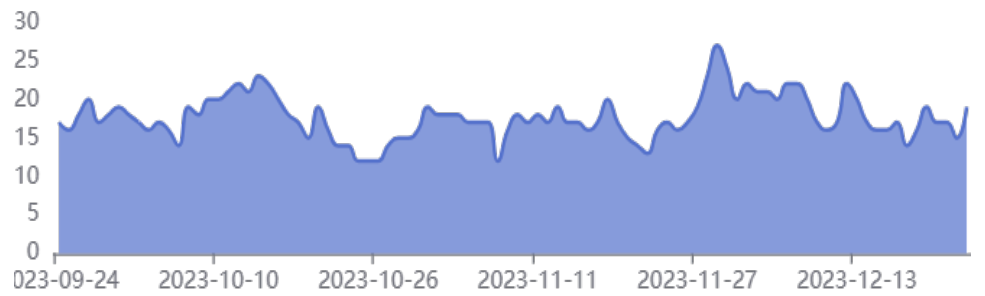
Type	M	T	W	Th	F	Sat	Sun
SMX	14	16	19	17	17	15	19



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.

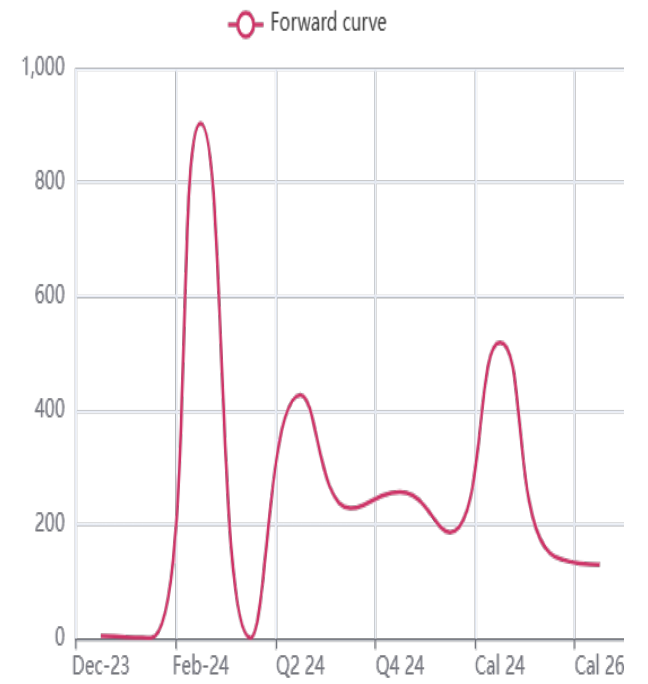
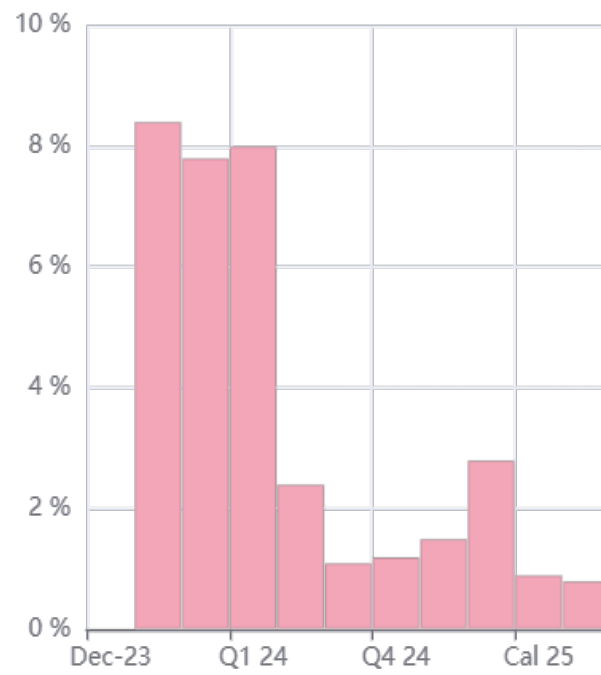
Type	M	T	W	Th	F	Sat	Sun
SMX	84	87	83	78	88	88	84



第五部分 远期运价协议 FFA

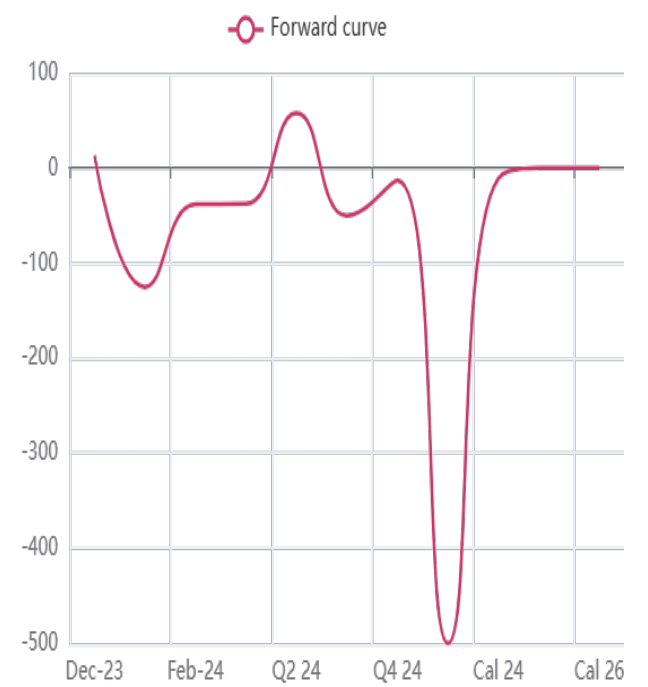
好望角型散货船Capesize

5TC	\$/day	WoW	
Dec-23	37,333.40	4.4	0.0 %
Jan-24	20,400.00	1575.0	8.4 %
Feb-24	12,521.00	903.0	7.8 %
Q1 24	15,688.00	1164.0	8.0 %
Q2 24	18,233.67	426.67	2.4 %
Q3 24	20,507.00	228.0	1.1 %
Q4 24	20,914.00	257.0	1.2 %
Q1 25	12,893.00	186.0	1.5 %
Cal 24	18,835.67	518.92	2.8 %
Cal 25	17,171.00	150.0	0.9 %
Cal 26	17,179.00	129.0	0.8 %



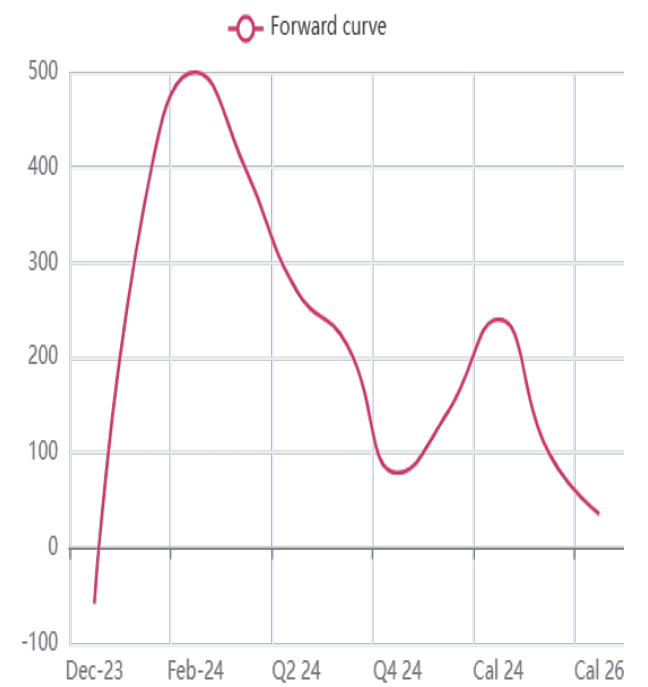
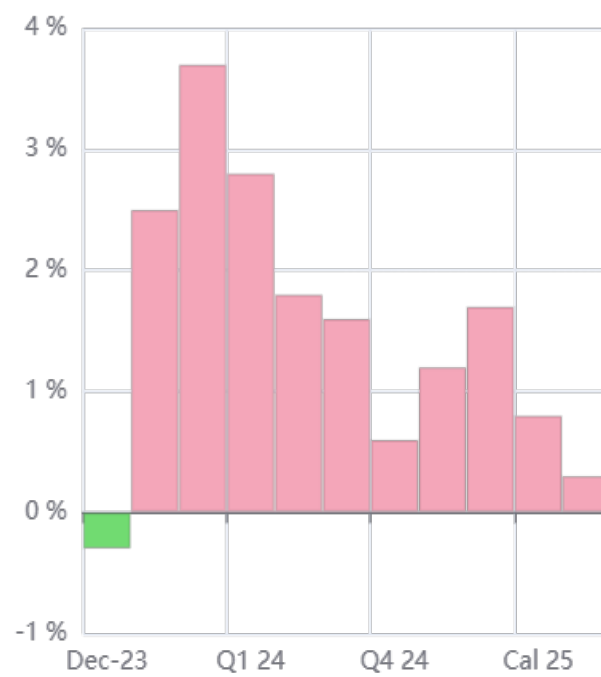
灵便型散货船Handysize

7TC	\$/day	WoW	
Dec-23	15,701.20	13.2	0.1 %
Jan-24	13,688.00	-125.0	-0.9 %
Feb-24	12,000.00	-38.0	-0.3 %
Q1 24	12,862.67	-37.67	-0.3 %
Q2 24	13,071.00	58.0	0.4 %
Q3 24	12,300.00	-50.0	-0.4 %
Q4 24	11,750.00	-13.0	-13.0 %
Q1 25	11,000.00	-500.0	-4.3 %
Cal 24	12,495.92	-10.67	-0.1 %
Cal 25	11,500.25	0.25	0.0 %
Cal 26	11,375.00	0.0	0.0 %



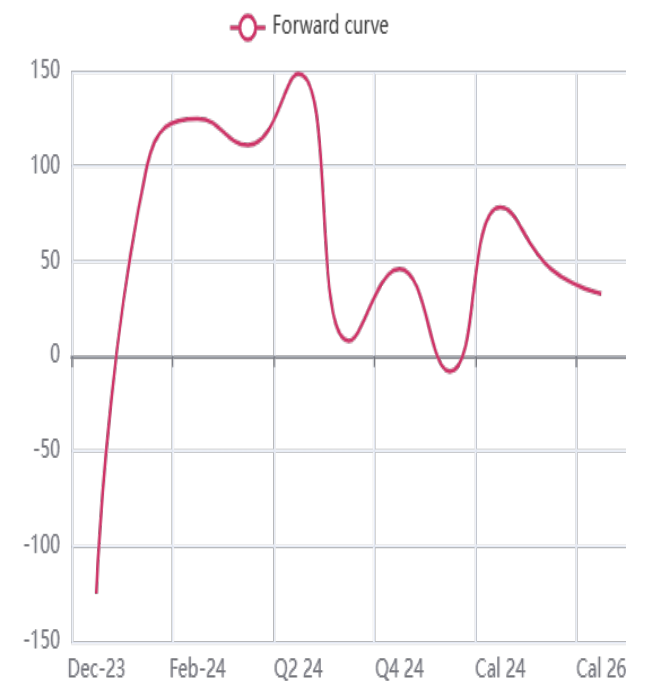
巴拿马型散货船Panamax

4TC	\$/day	WoW	
Dec-23	17,334.80	-58.2	-0.3 %
Jan-24	14,943.00	364.0	2.5 %
Feb-24	13,843.00	500.0	3.7 %
Q1 24	14,520.33	397.67	2.8 %
Q2 24	15,000.00	271.0	1.8 %
Q3 24	13,814.00	214.0	1.6 %
Q4 24	13,043.00	79.0	0.6 %
Q1 25	11,664.00	143.0	1.2 %
Cal 24	14,094.33	240.42	1.7 %
Cal 25	12,189.00	100.0	0.8 %
Cal 26	11,979.00	36.0	0.3 %



超大灵便型散货船Supramax

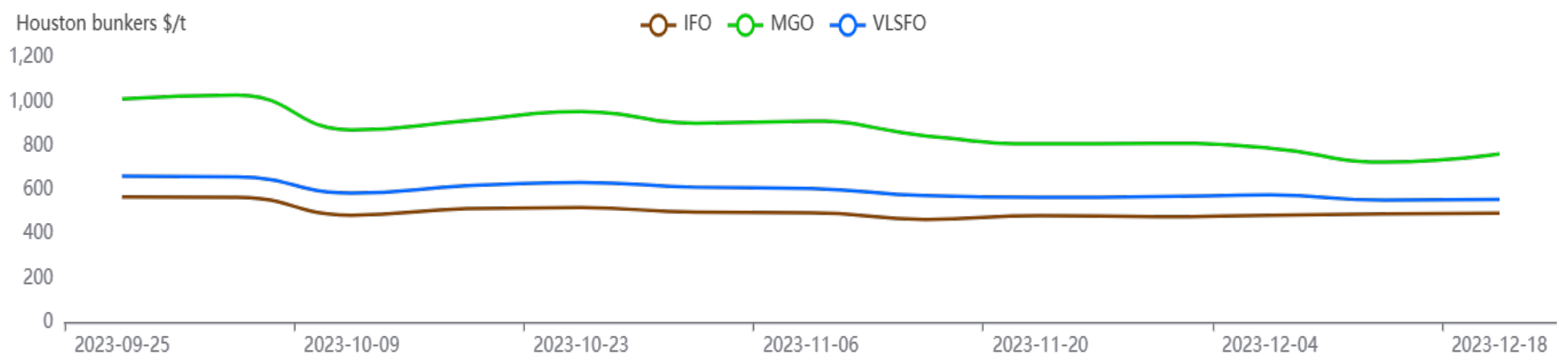
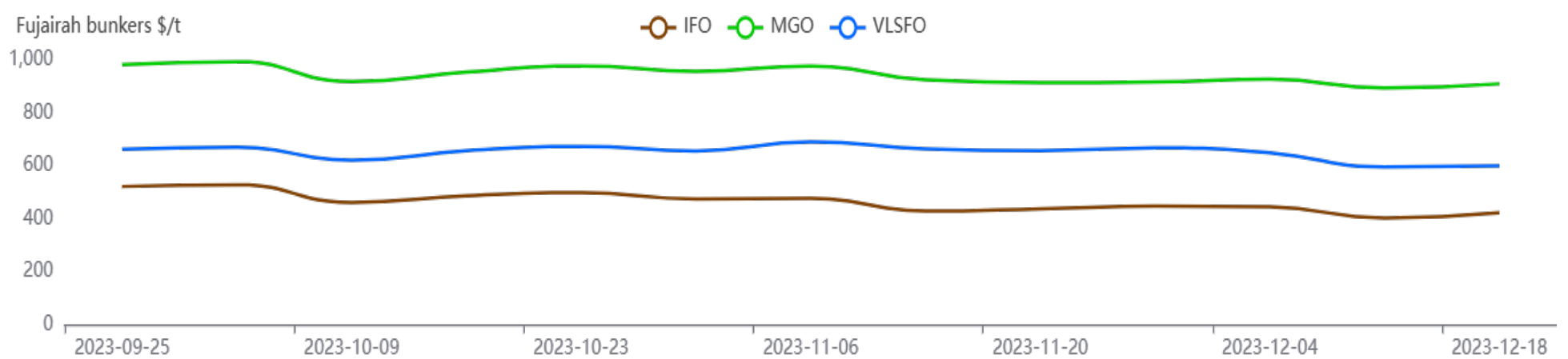
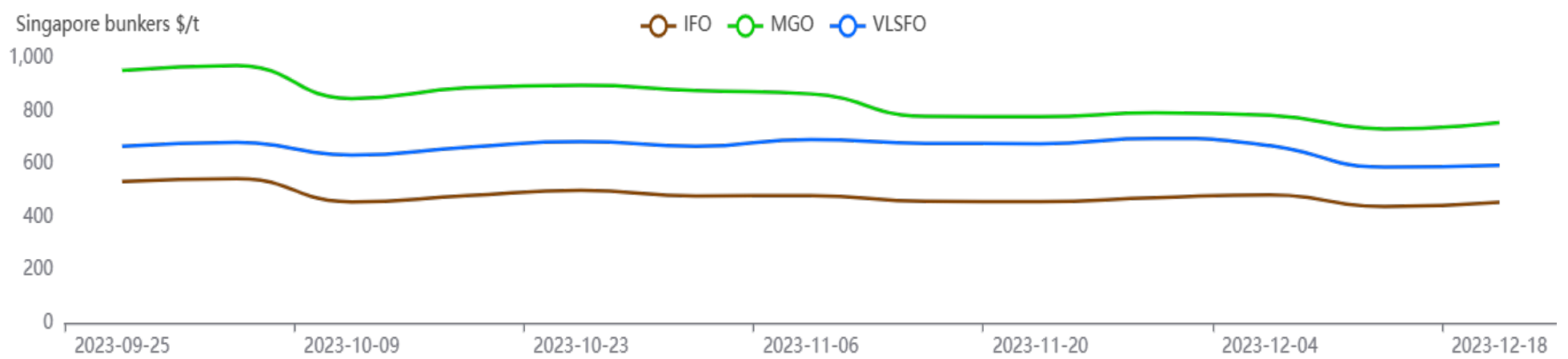
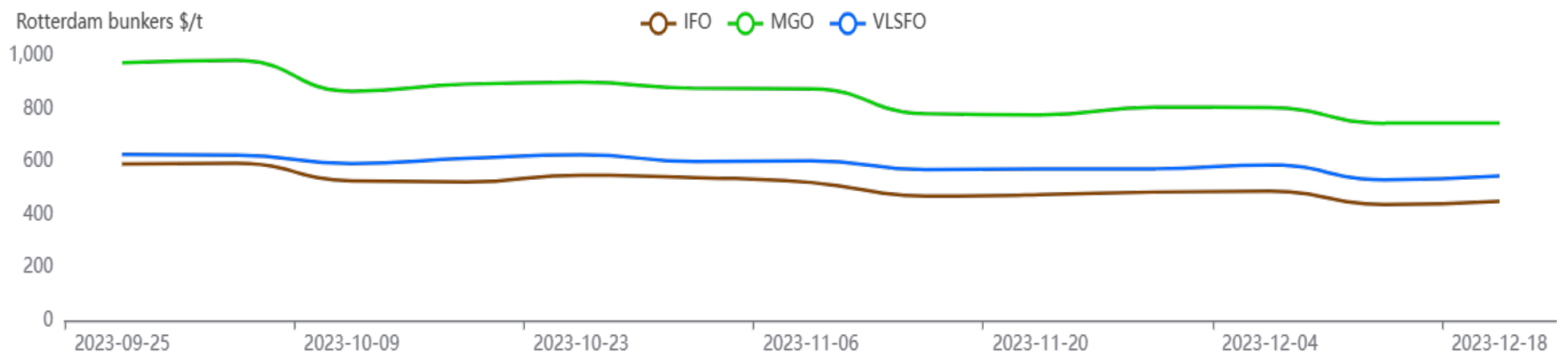
10TC	\$/day	WoW	
Dec-23	16,142.10	-124.9	-0.8 %
Jan-24	14,133.00	100.0	0.7 %
Feb-24	12,958.00	125.0	1.0 %
Q1 24	13,688.67	111.0	0.8 %
Q2 24	14,052.67	148.67	1.1 %
Q3 24	13,250.00	8.0	0.1 %
Q4 24	12,946.00	46.0	0.4 %
Q1 25	12,100.00	-8.0	-0.1 %
13,484.33	Cal 24	78.42	0.6 %
Cal 25	12,154.00	46.0	0.4 %
Cal 26	12,058.00	33.0	0.3 %



第六部分 燃油价格 BUNKER PRICE

MP	LO	HO	MO	SP	WoW	W%	M%
zhoushan	636.0	472.0	814.0	164.0	5.0	3.14	-20.96
Singapore	595.5	456.0	757.0	139.5	-10.0	-6.69	-36.3
Rotterdam	547.0	451.0	747.0	96.0	2.0	2.13	-1.54
Fujairah	599.5	422.5	910.0	177.0	-16.0	-8.29	-19.73
Houston	557.0	495.0	763.5	62.0	0.0	0.0	-25.3

(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		225.0	0.81	0.36	2.57	-21.96
Maize		228.0	-2.65	-1.15	1.07	-25.54
Soybeans		258.0	0.56	0.22	-1.33	-14.62
Rice		260.0	2.18	0.85	6.29	38.35
Barley		224.0	-0.31	-0.14	2.03	-27.33
Energy		Index	+/-	Weekly	Monthly	YTD
Crude Oil	USD/Bbl	71.05	0.36	0.51	-7.68	-3.36
Brent	USD/Bbl	76.2	0.72	0.95	-6.47	-2.04
Natural Gas	USD/MMBtu	2.55	0.15	6.25	-12.07	-61.25
Gasoline	USD/Gal	2.11	0.06	2.93	-4.09	1.44
Heating Oil	USD/Gal	2.61	0.03	1.16	-7.12	-11.53
Ethanol	USD/Gal	1.68	-0.05	-2.89	-10.64	-22.94
Naphtha	USD/T	629.94	7.73	1.24	0.51	6.78
Propane	USD/Gal	0.67	-0.02	-2.9	4.69	-2.9
Uranium	USD/Lbs	82.3	0.85	1.04	11.22	69.06
Methanol	CNY/T	2397.0	-41.0	-1.68	-3.03	-7.9
TTF Gas	EUR/MWh	33.54	-3.05	-8.34	-28.15	-75.68
UK Gas	GBP/thm	83.79	-8.44	-9.15	-29.51	-75.44
Industrial		Index	+/-	Weekly	Monthly	YTD
Copper	USD/Lbs	3.86	0.07	1.85	2.93	1.58
Coal	USD/T	145.3	-5.7	-3.77	17.84	-63.81
Steel	CNY/T	3861.0	-126.0	-3.16	-2.3	5.52
Iron Ore	USD/T	137.0	-0.5	-0.36	3.4	20.59
Aluminum	USD/T	2267.5	138.0	6.48	1.43	-6.5
Iron Ore Fe 62%	USD/T	2267.5	138.0	6.48	1.43	-6.5
Metals		Index	+/-	Weekly	Monthly	YTD
Gold	USD/t.oz	2020.4	28.1	1.41	2.08	13.4
Silver	USD/t.oz	23.9	0.99	4.32	1.31	2.49
Platium	USD/t.oz	944.5	24.7	2.69	4.41	-5.78
Currencies		Index	+/-	Weekly	Monthly	YTD
EUR/USD		1.09	0.01	0.93	0.0	3.81
USD/CNY		7.14	-0.05	-0.7	-0.42	2.29

第八部分 本周话题 WEEKLY TOPIC



红海航线混乱，保费涨，运费涨

自10月7日以色列和巴勒斯坦武装组织哈马斯爆发战争以来，红海已经被胡赛武装扰动得不得安宁。12月14日胡赛武装开始对曼德海峡的目标商船采用导弹袭击，一艘大型集装箱船被击中起火，12月18日一艘2万载重吨的化学品船从红海接近曼德海峡30海里处也遭到了导弹袭击并起火，红海形势变得更加严峻。这一系列袭击首先导致了红海的不安定，并威胁到占世界贸易12%的航道上的贸易。从石油到小麦再到电视机，红海和埃及的苏伊士运河每天要运送价值数十亿美元的货物。曼德海峡遭到胡赛武装袭击以来，大型集装箱公司反应最快，纷纷在通过曼德海峡前掉头绕行或者漂航。12月18号，hiFleet航运大数据平台发现超过40多艘集装箱船舶掉头、漂航、或者绕航好望角，船舶保费大涨，运费也大涨。相信通行红海的所有国际商船都将受到影响，风浪越大鱼越贵，航运市场又要涨价。红海的严峻形势使得供应链受到影响，会加速供应链转移，对中国也不是好事。美国白宫在11月27日就表示在红海准备部署特遣队，以优先维护本国船队的安全通行，随着红海局势恶化，这一计划大大提前了，12月18日美国早些时候正式宣布，将领导一只多国海军行动，以保护从亚丁湾到苏伊士运河的通道安全，美国国防部长劳埃德·奥斯汀宣布建立“繁荣卫士行动”，该联合特遣部队重点关注红海的安全。尽管有这么一支名为“繁荣卫士行动”的海上保护部队，但在胡塞叛军发动一连串袭击后，出于安全考虑，很少有航运公司计划迅速返回该地区。

The Red Sea has been roiled by the Houthis since a war broke out between Israel and the Palestinian militant group Hamas on October 7. On December 14, the Houthi armed forces began to use missile attacks on target commercial vessels in the Bab el-Mandeb Strait, a large container ship was hit by fire, and on December 18, a 20,000 DWT chemical tanker was also attacked by missiles and caught fire 30 nautical miles from the Red Sea to the Bab El-Mandeb Strait. The series of attacks first caused instability in the Red Sea and threatened trade in a waterway that accounts for 12 percent of world trade. From oil to wheat to television sets, the Red Sea and Egypt's Suez Canal move billions of dollars worth of goods every day. Since the Bab el-Mandeb Strait was attacked by the Houthi armed forces, large container companies have responded swiftly, turning around or drifting before passing through the Bab El-Mandeb Strait. On December 18, hiFleet shipping big data platform found that more than 40 container ships turned around, or drifting, or circled the Cape of Good Hope, and vessel additional war premiums rose sharply, and freight rates rose sharply. It is believed that all international merchant ships passing through the Red Sea will be affected, the bigger the wind and waves, the more expensive the fish, and the shipping market will increase in price. The severe situation in the Red Sea will affect the supply chain, which will accelerate the supply chain transfer, and it is not good for China. The White House said on November 27 that it was ready to deploy a task force in the Red Sea to prioritize the safe passage of its own fleet. As the situation in the Red Sea worsened, the plan was greatly advanced, and the United States officially announced later on December 18 that it would lead a multinational naval operation to protect the passage from the Gulf of Aden to the Suez Canal. US Secretary of Defence Lloyd Austin announced establishing 'Operation Prosperity Guardian' a joint task force focused on security in the Red Sea. Even with the roll-out of a maritime protection force named Operation Prosperity Guardian, few shipping lines plan a quick return to the region amid safety concerns after a spate of attacks by Houthi rebels.