



2023年 第51周市场周报

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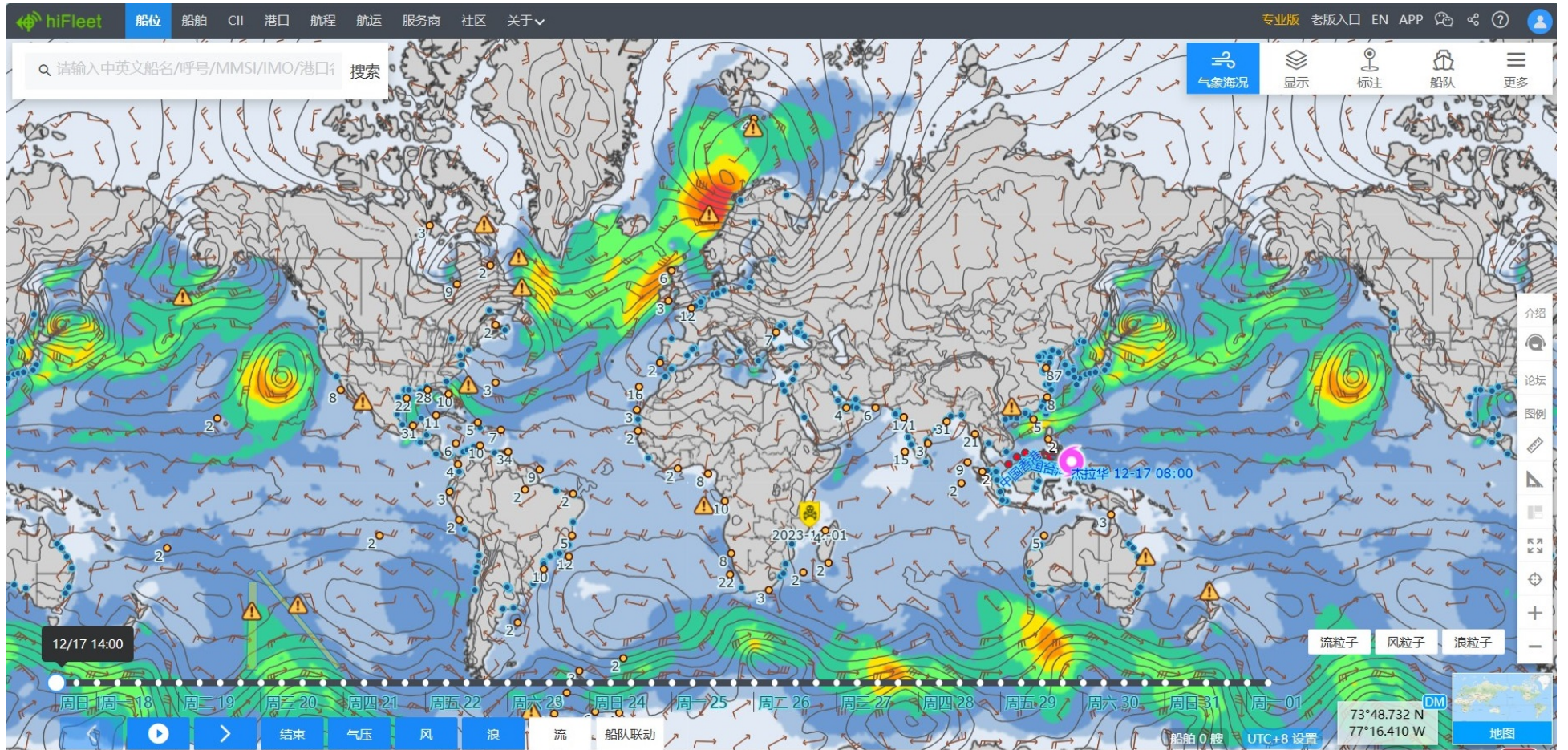
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本周话题 WEEKLY TOPIC

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772个，远东、美湾和环加勒比海居多，请相关水域船舶注意航行警告内容。There are currently 772 navigational warnings in effect around the ocean on hiFleet with the Far East, US Gulf 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

最近一周发生的海盗事件发生在12月14号阿拉伯海。当前一艘总载重量为 41600 吨的 Ruen号轮，位于也门索科特拉岛以东约 400 英里的公海上，正驶向索马里，相信该船已经被索马里海盗所劫持。The latest piracy reports within the week happened on 14th Dec in Arab Sea. M.V. Ruen, a 41,600-ton handymax in international waters about 400 miles east of the Yemeni island of Socotra heading for Somalia, is believed to have been seized by Somali pirates.

其它 Others

无 Nil

航海气象 Meteorology

未来一周中国渤海、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；台湾海峡风力维持强势，7-8级，台湾海峡洋面海浪可能经历5米巨浪，南海大部海域风力维持在5-7级，海浪有时出现4米大浪。大西洋和太平洋北部区域低压活动频繁，相关海域海况正在变得恶劣。In the coming week the wind in China's 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 stays strong, with the wind to gale. 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. Low-pressure in the north of North Atlantic Ocean and Pacific is frequent, leading to deteriorating sea conditions.

海上事件 Marine Incidents

马士基(Maersk)12月14日报告称，其集装箱船Maersk Gibraltar在曼德海峡附近遭到一枚导弹的袭击，这是该地区针对航运的最新袭击。马士基表示，袭击发生时，该船正从阿曼的塞拉莱(Salalah)驶往沙特阿拉伯的吉达(Jeddah)。幸运的是，据报道船员和船只都安全。美国已经确定这枚导弹是从也门胡塞控制地区发射的弹道导弹。Maersk reported that its containership Maersk Gibraltar was targeted by a missile near the Bab-el-Mandeb Strait on 14th Dec, the latest attack against shipping in the region. The attack occurred as the ship was en route from Salalah of Oman to Jeddah, Saudi Arabia, Maersk said. Fortunately, the crew and ship were reported safe. The U.S. has determined the missile was a ballistic missile fired from a Houthi-controlled area of Yemen.

备注 Remark

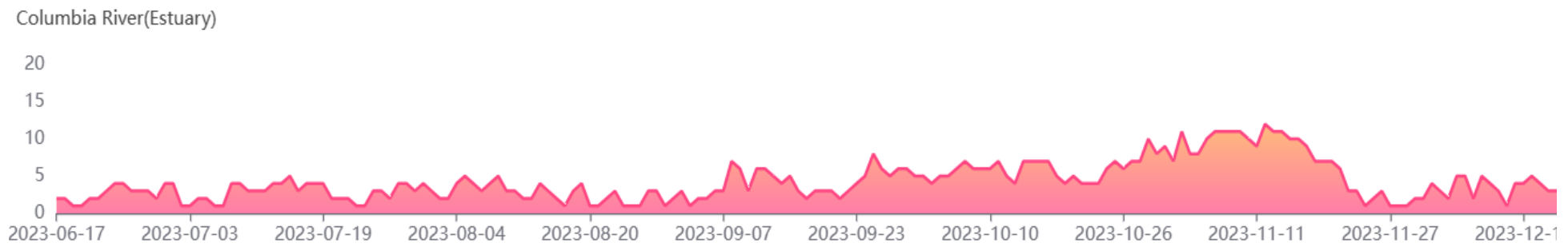
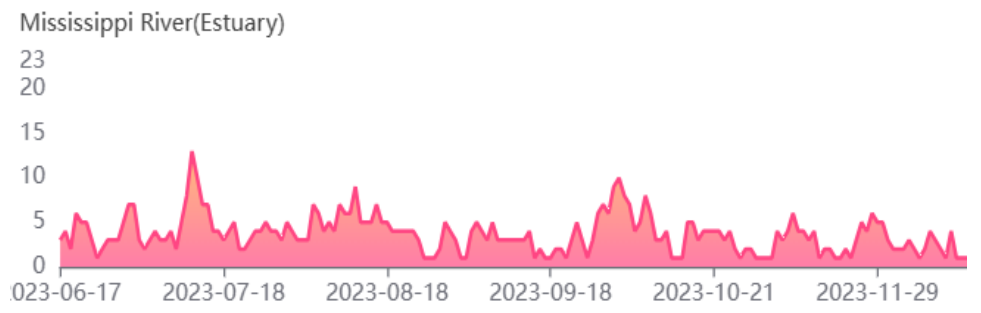
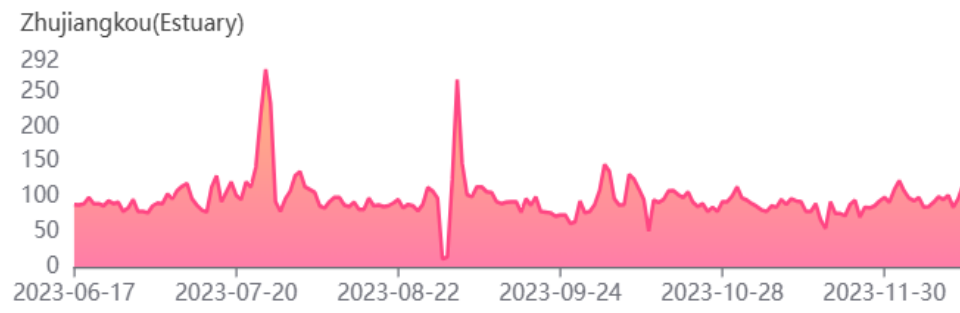
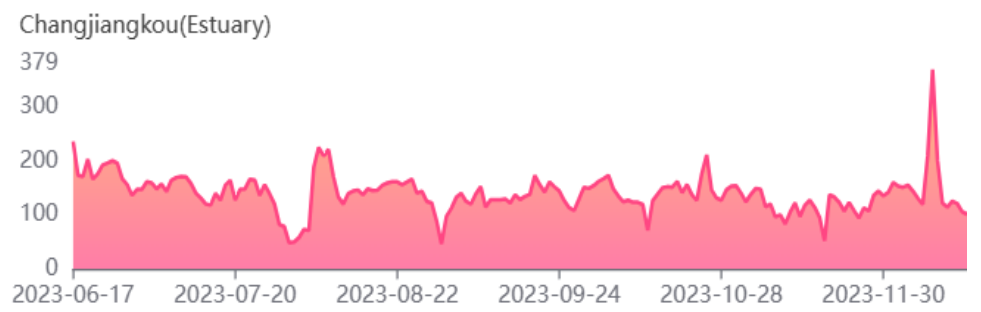
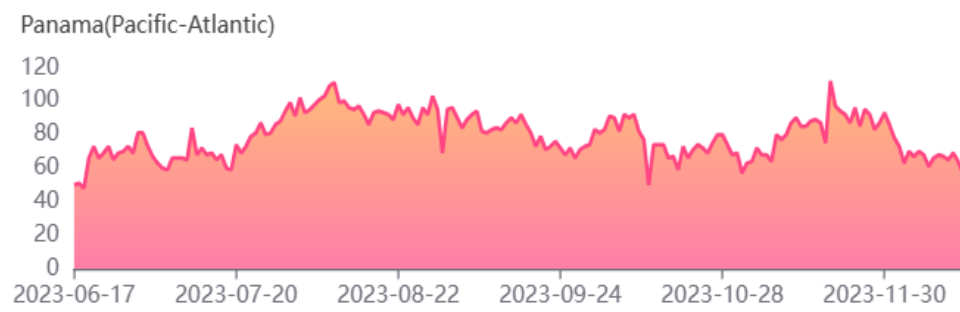
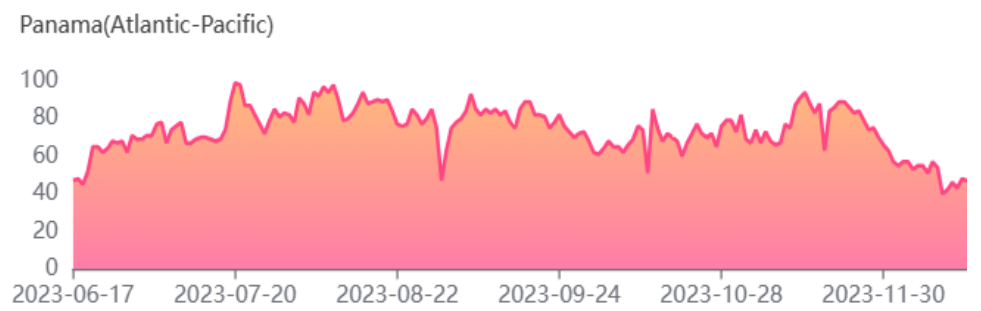
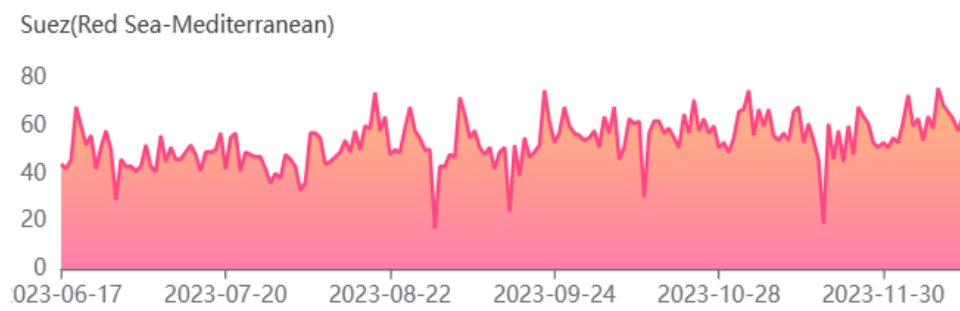
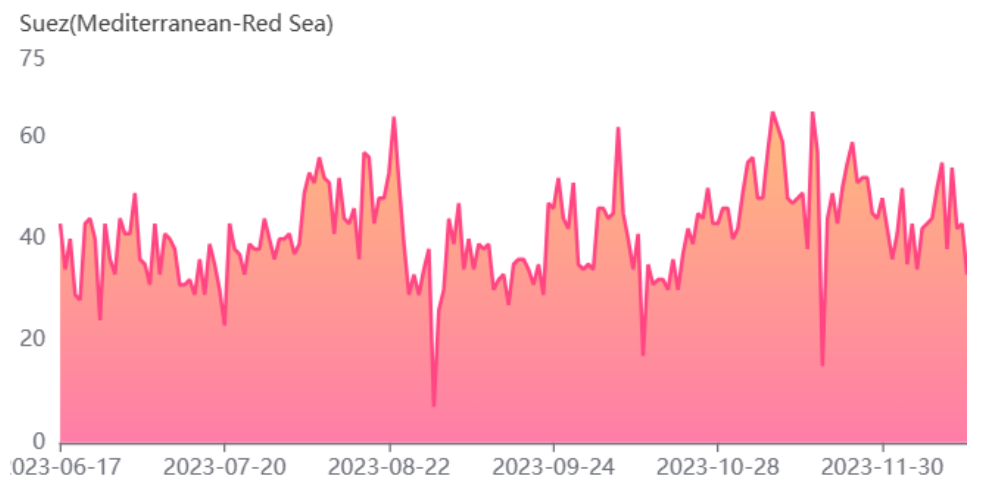
本报告数据截止时间为2023年12月17日北京时间17点；所有数据和或观点仅供参考，在任何情况下本公司及其员工不承担任何风险。The data deadline for this report is Beijing time 17 hours on December 17 of 2023; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

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	50	1708	17	27
Miss.Riv.	1	71	-6	14
CJK	101	4083	-172	396
Pa.Atlan.	47	1845	-63	-353
Colum.Riv.	3	96	-2	-156
Suez.Med.	33	1317	27	-73
Pa.Pac.	59	2264	-23	41
ZJK	99	2705	3	160

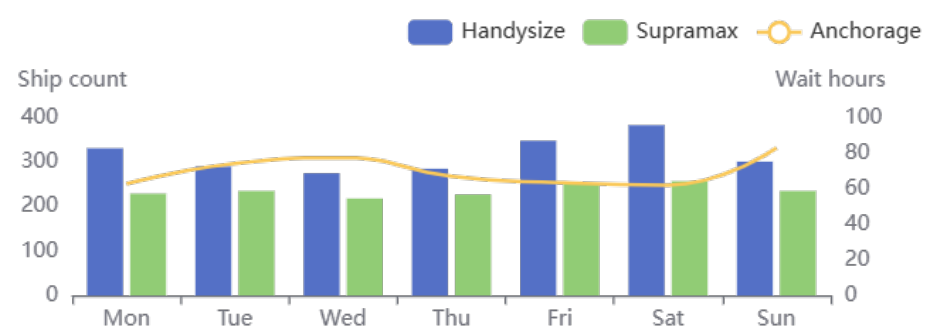


(P.N.-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

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

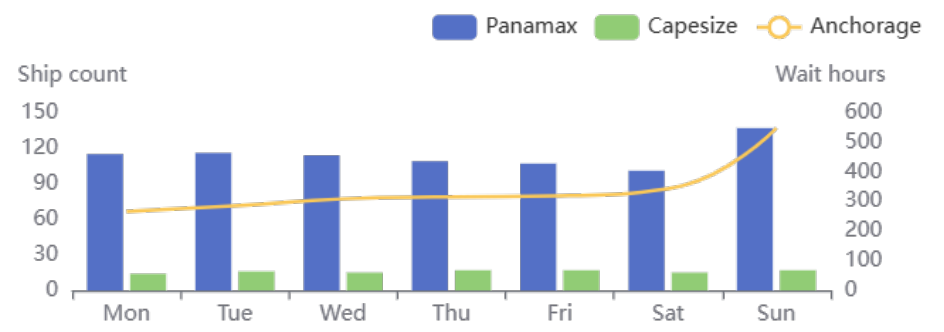
Type	M	T	W	Th	F	Sat	Sun
HDY	331	290	275	285	348	383	301
SMX	229	235	218	227	252	257	235
WT.h.	62.8	74.2	77.5	67	63.45	62.1	83



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

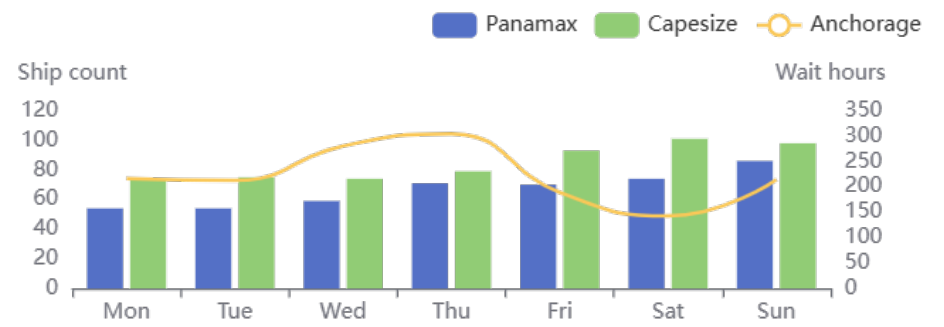
Type	M	T	W	Th	F	Sat	Sun
Pan.	115	116	114	109	107	101	137
Cap	14	16	15	17	17	15	17
WT.h.	266.7	285.4	309	315.8	319.4	343.4	548



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

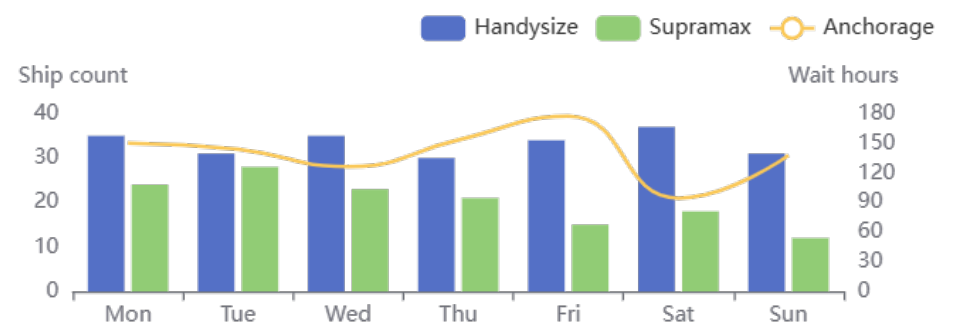
Type	M	T	W	Th	F	Sat	Sun
Pan.	54	54	59	71	70	74	86
Cap	74	75	74	79	93	101	98
WT.h.	216.55	212.7	280.3	304.3	189.1	142.5	214



最近一周黑海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 & Handy Num. and Waiting Time Information in Anchorages of Black Sea

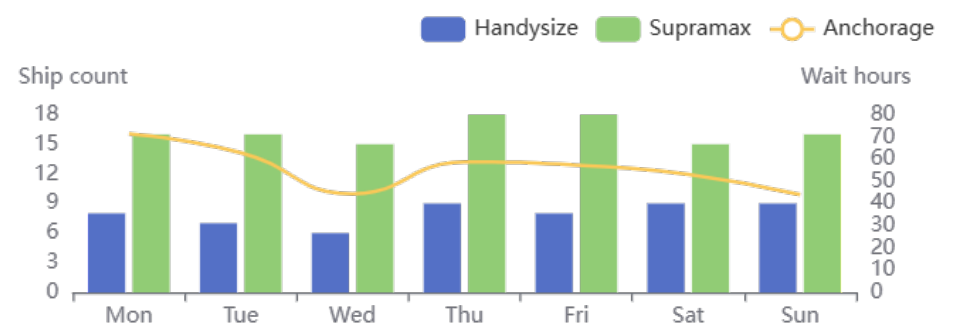
Type	M	T	W	Th	F	Sat	Sun
HDY	35	31	35	30	34	37	31
SMX	24	28	23	21	15	18	12
WT.h.	150.1	143.9	126.3	153.4	177.4	94.5	138



最近一周美湾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 US Gulf

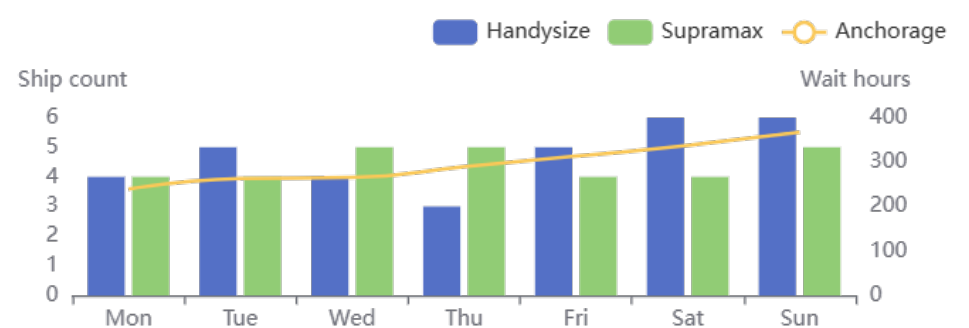
Type	M	T	W	Th	F	Sat	Sun
HDY	8	7	6	9	8	9	9
SMX	16	16	15	18	18	15	16
WT.h.	71.35	62.9	44.4	58.7	57.3	53.1	44



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

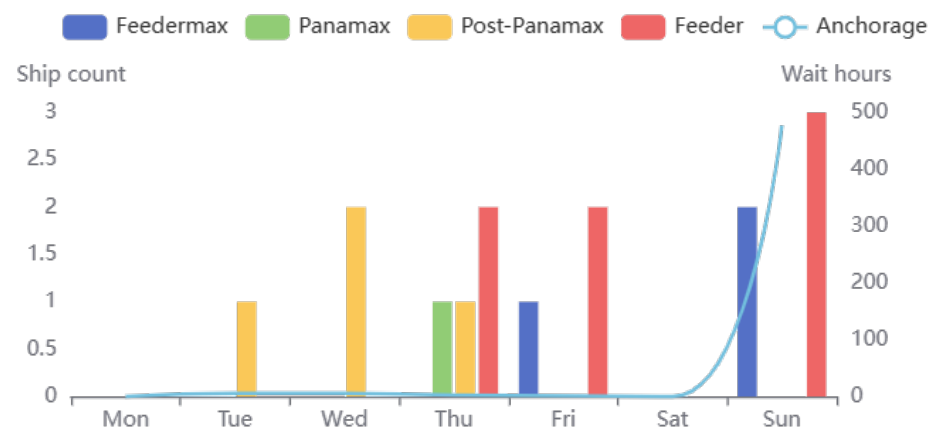
Type	M	T	W	Th	F	Sat	Sun
HDY	4	5	4	3	5	6	6
SMX	4	4	5	5	4	4	5
WT.h.	239.1	263.1	265.3	289.3	313.3	337.3	367



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

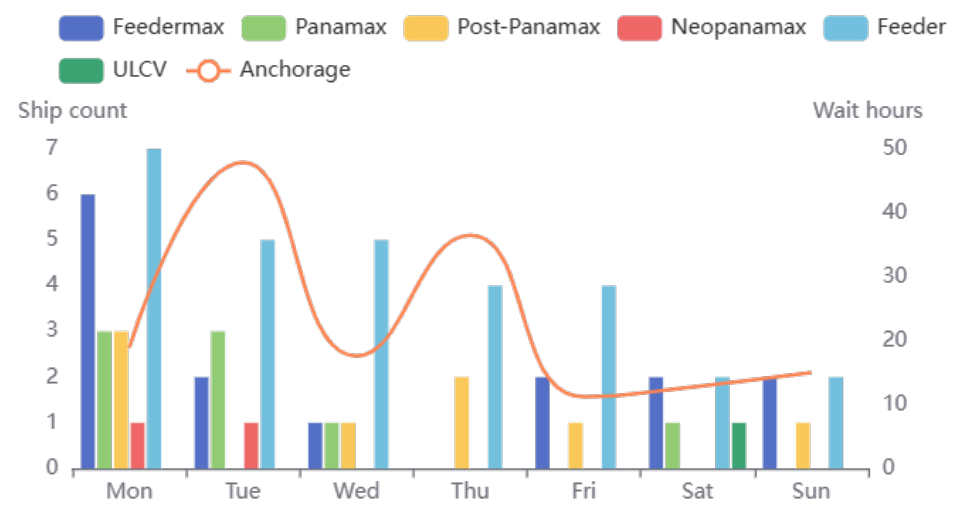
Type	M	T	W	Th	F	Sat	Sun
F.ma.	0	0	0	0	1	0	2
Pan.	0	0	0	1	0	0	0
PPx	0	1	2	1	0	0	0
NPx	0	0	0	0	0	0	0
Fd	0	0	0	2	2	0	3
WT.h.	0.0	5.8	5.8	2.3	1.5	0.0	477
Ulcw	0	0	0	0	0	0	0



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

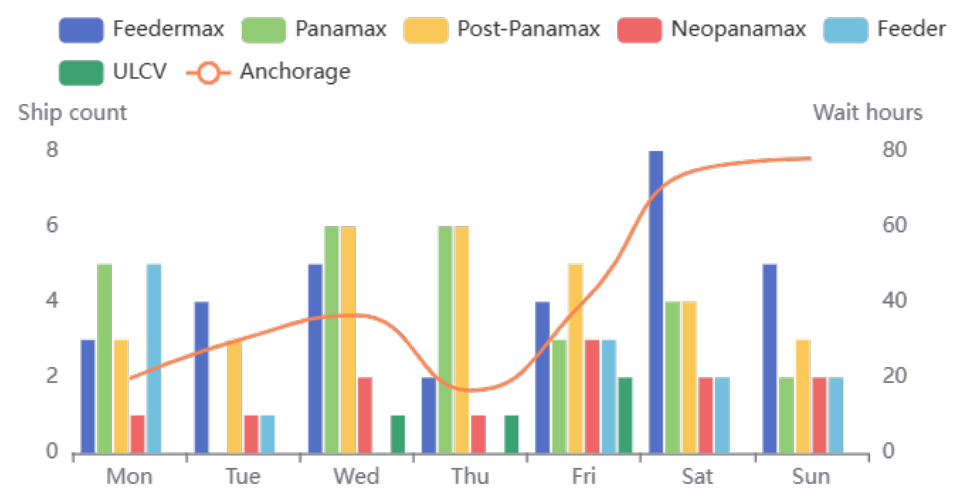
Type	M	T	W	Th	F	Sat	Sun
F.ma.	6	2	1	0	2	2	2
Pan.	3	3	1	0	0	1	0
PPx	3	0	1	2	1	0	1
NPx	1	1	0	0	0	0	0
Fd	7	5	5	4	4	2	2
Ulcw	0	0	0	0	0	1	0
WT.h.	18.9	47.9	17.6	36.5	11.2	12.85	15



最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

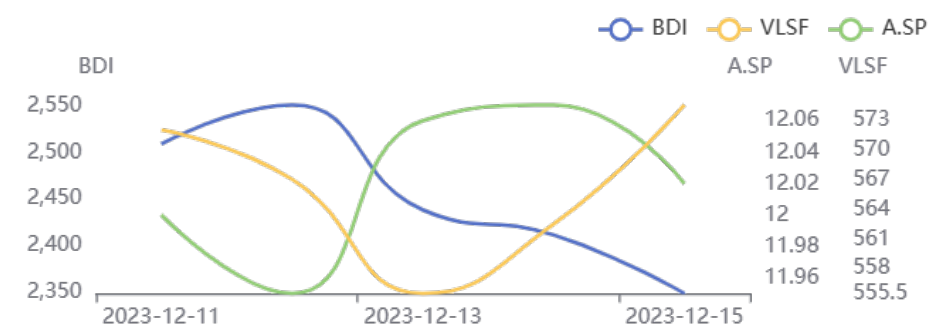
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

Type	M	T	W	Th	F	Sat	Sun
F.ma.	3	4	5	2	4	8	5
Pan.	5	0	6	6	3	4	2
PPx	3	3	6	6	5	4	3
NPx	1	1	2	1	3	2	2
Fd	5	1	0	0	3	2	2
Ulcw	0	0	1	1	2	0	0
WT.h.	19.7	30.3	36.5	16.6	40.2	75.05	78



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

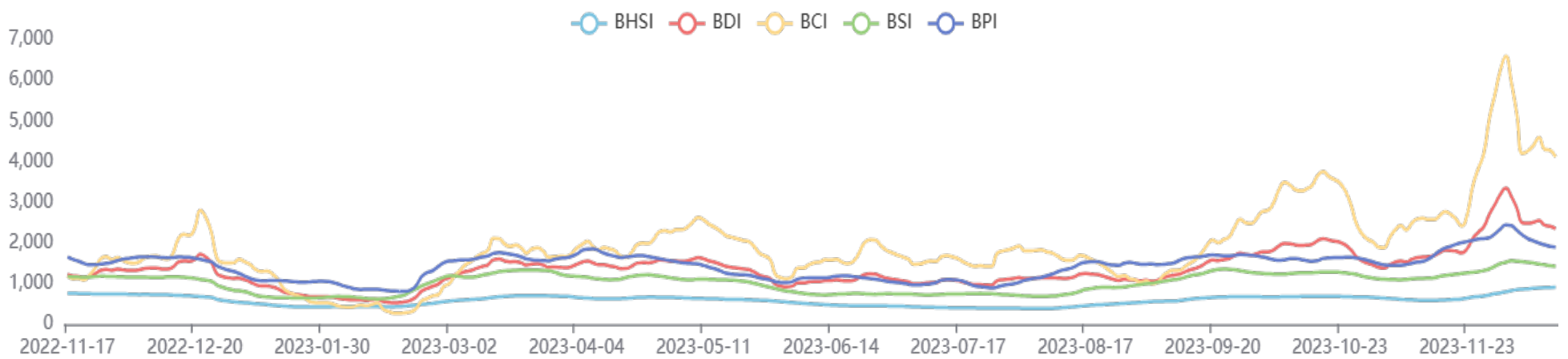
Type	M	T	W	Th	F	Sat	Sun
BDI	2049	1996	1953	1915	1900		
VLSF	572	567	555.5	562.5	574.5		
A.SP	12.0	11.95	12.06	12.07	12.02	12.04	



第三部分 航运市场 SHIPPING MARKET

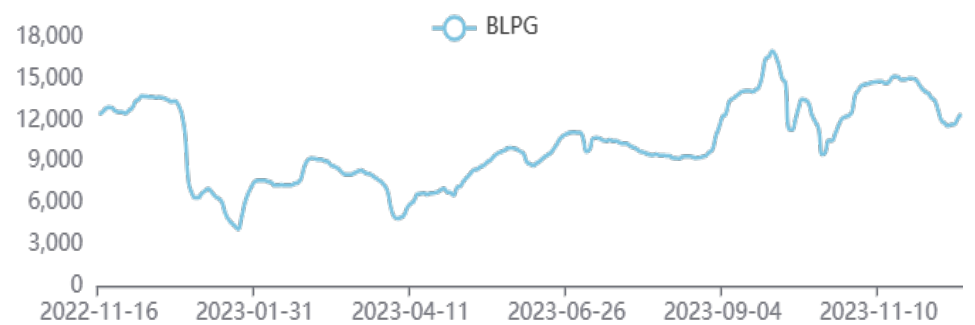
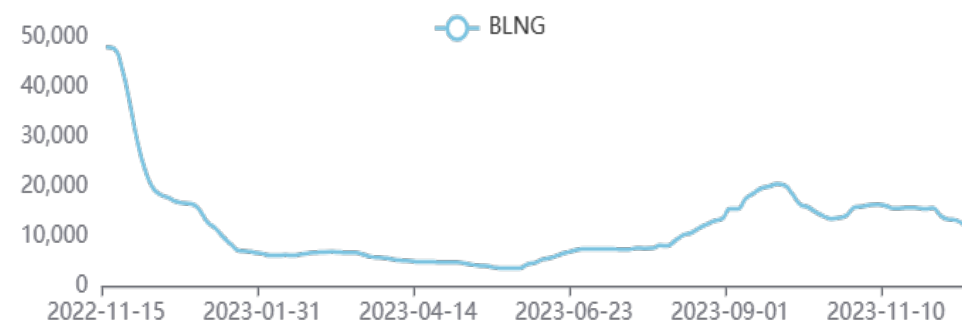
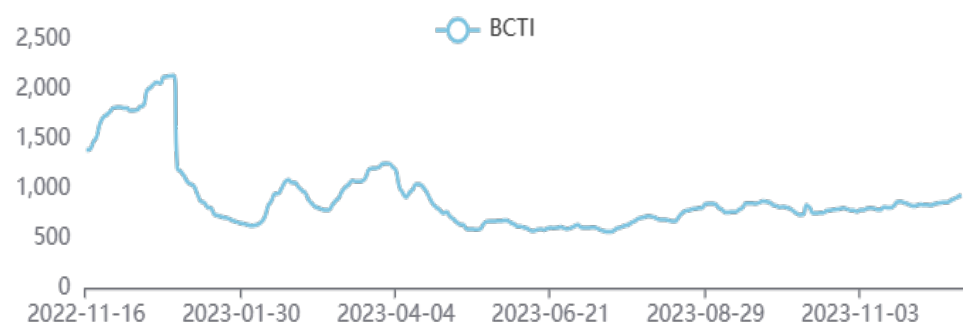
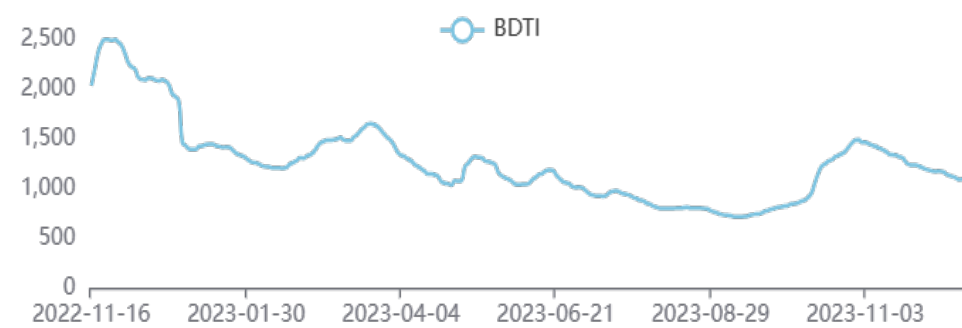
波罗的海干散货指数Baltic Dry Index

Type	PI	WoW	W%	M%	y%
BDI	2348	-135.0	-5.44	29.01	53.66
BCI	4113	-146.0	-3.43	48.86	96.32
BPI	1900	-204.0	-9.7	1.39	14.6
BSI	1426	-95.0	-6.25	18.34	22.19
BHSI	908	36.0	4.13	51.59	27.35



能源运价指数Energy Shipping Index

Type	PI	WoW	W%	M%	y%
BDTI	1103	-26.0	-2.3	-16.25	-47.28
BCTI	933	75.0	8.74	12.95	-54.77
BLNG	12219	-1129.0	-8.46	-21.83	-27.79
BLPG	12416	660.0	5.61	-18.11	-7.54



第四部分 运力分布 SUPPLY DISTRIBUTION

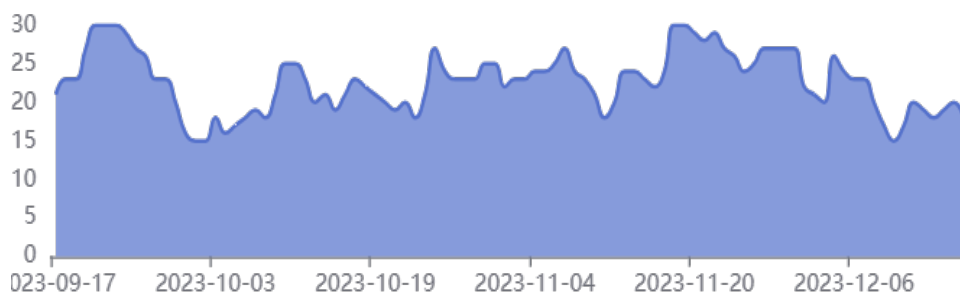


好望角型散货船 Capesize

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.

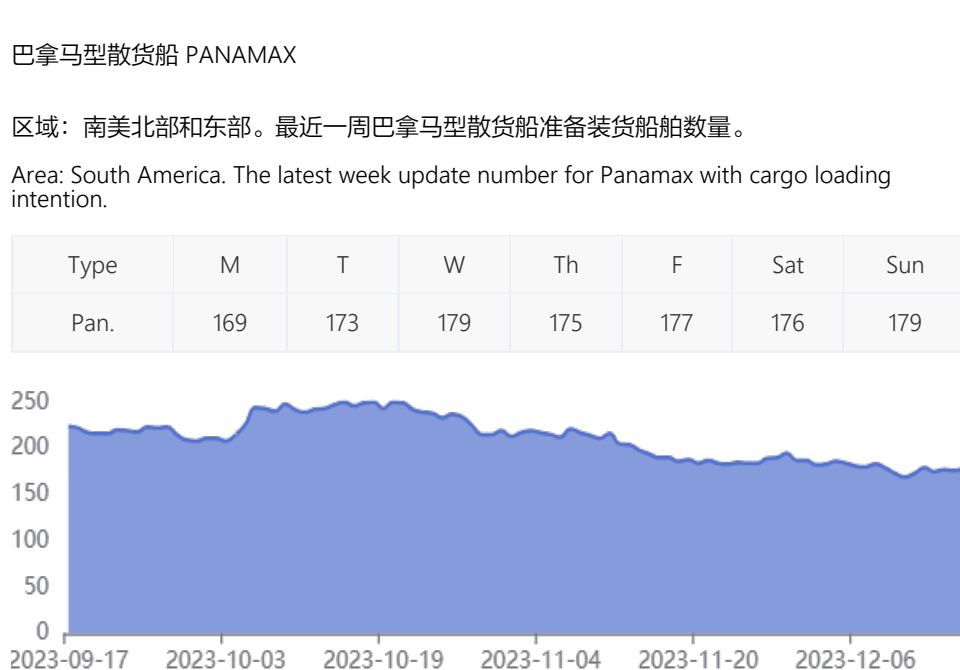
Type	M	T	W	Th	F	Sat	Sun
Cape	17	20	19	18	19	20	18



区域：南非，最近一周好望角型散货船准备装货船舶数量

Area: South Africa, The latest week update number for Capesize with cargo loading intention.

Type	M	T	W	Th	F	Sat	Sun
Cape	23	18	14	10	12	15	21

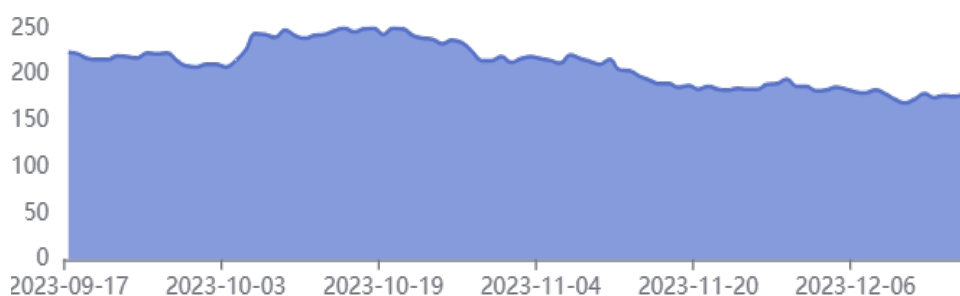


巴拿马型散货船 PANAMAX

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.

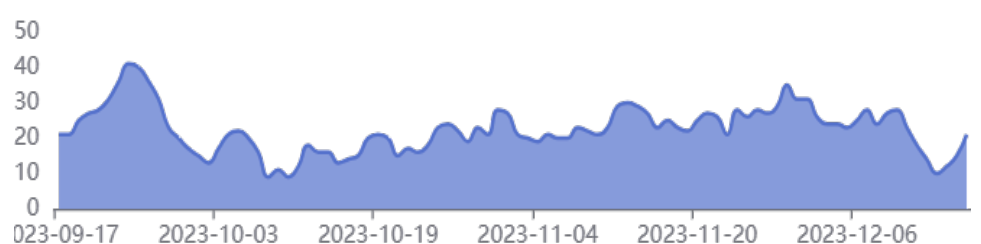
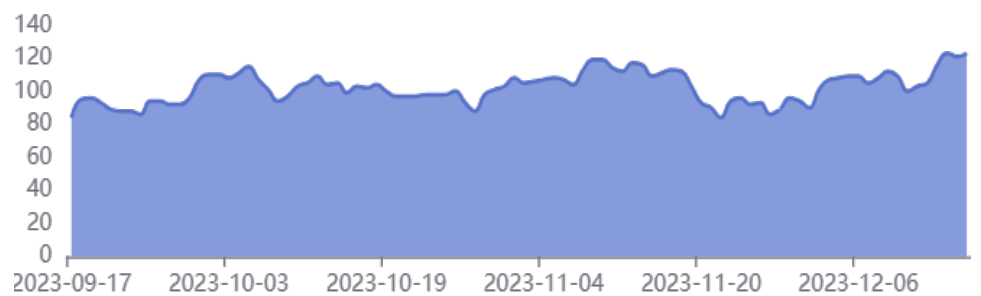
Type	M	T	W	Th	F	Sat	Sun
Pan.	169	173	179	175	177	176	179



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.

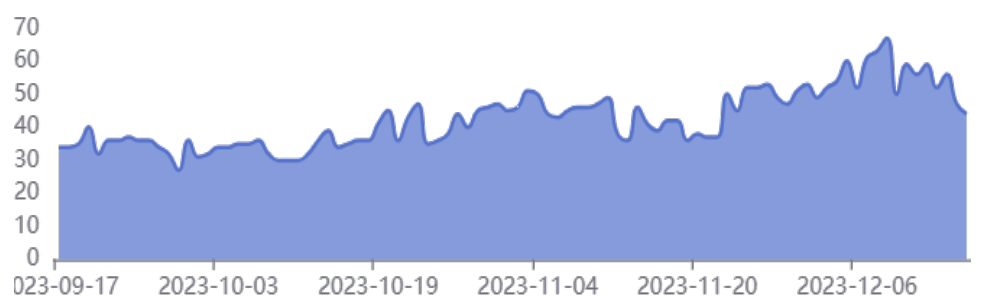
Type	M	T	W	Th	F	Sat	Sun
Cape	100	103	105	116	123	121	123



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.

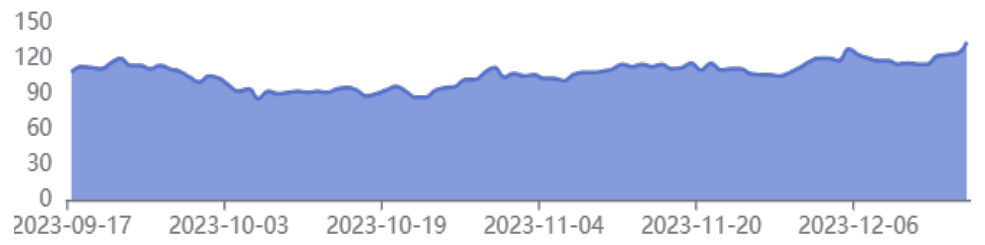
Type	M	T	W	Th	F	Sat	Sun
Pan.	52	53	54	45	54	55	50



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.	116	115	115	122	123	124	134

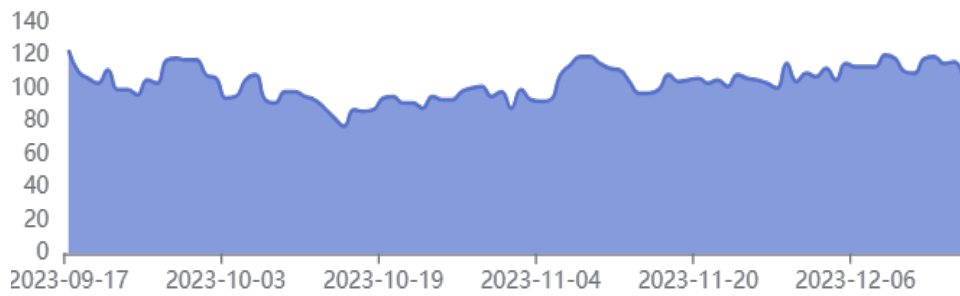


超大灵便型散货 SUPRAMAX

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.

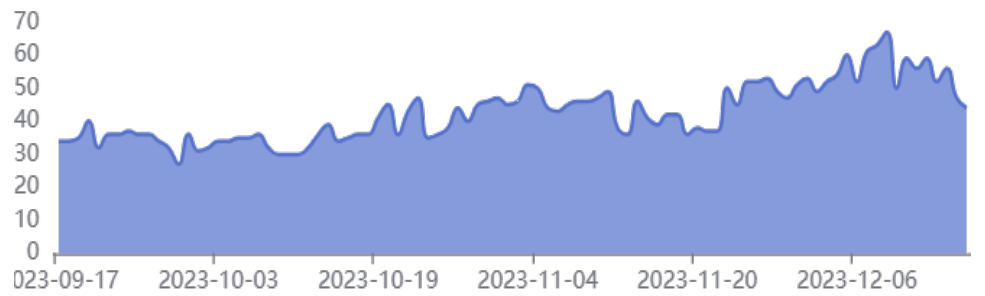
Type	M	T	W	Th	F	Sat	Sun
SMX	110	109	118	119	115	116	106



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.

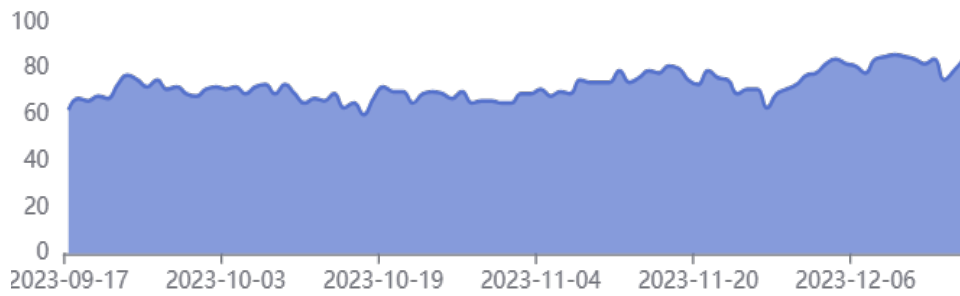
Type	M	T	W	Th	F	Sat	Sun
SMX	59	56	59	52	56	47	44



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.

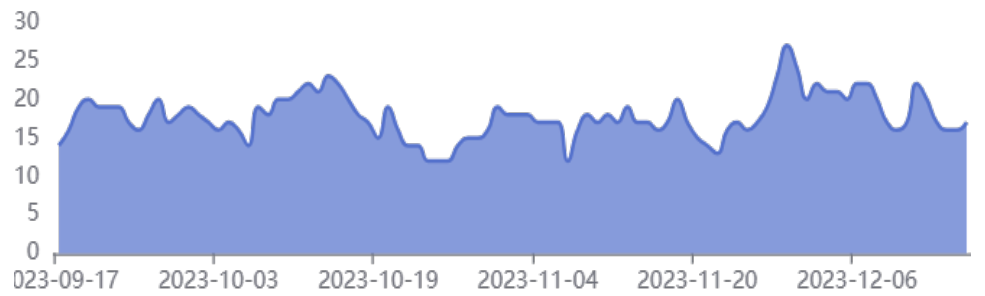
Type	M	T	W	Th	F	Sat	Sun
SMX	17	22	20	17	16	16	17



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.

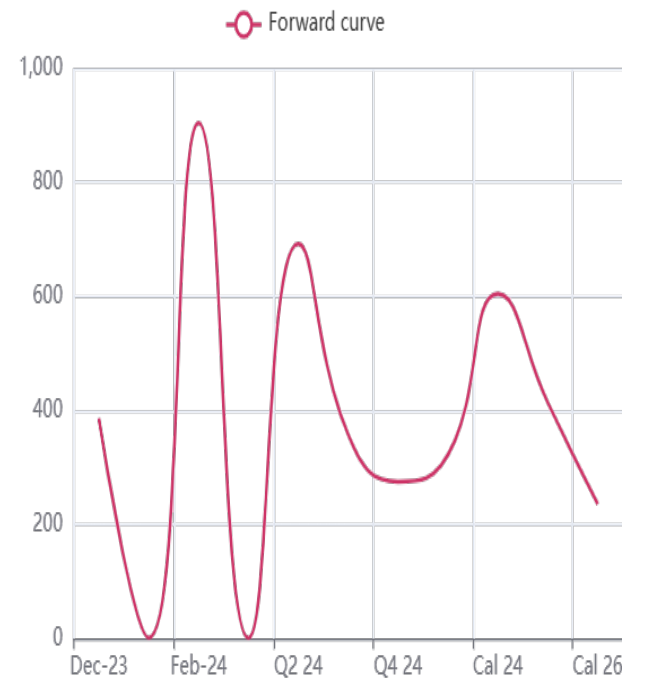
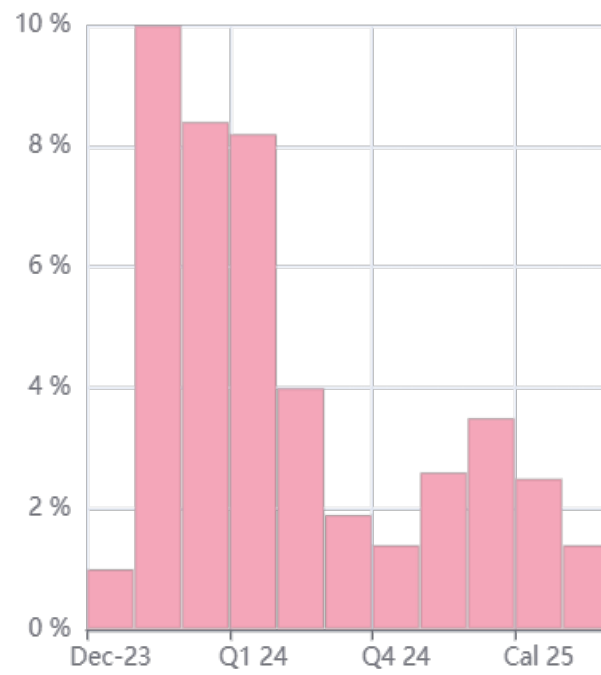
Type	M	T	W	Th	F	Sat	Sun
SMX	85	84	82	84	75	79	84



第五部分 远期运价协议 FFA

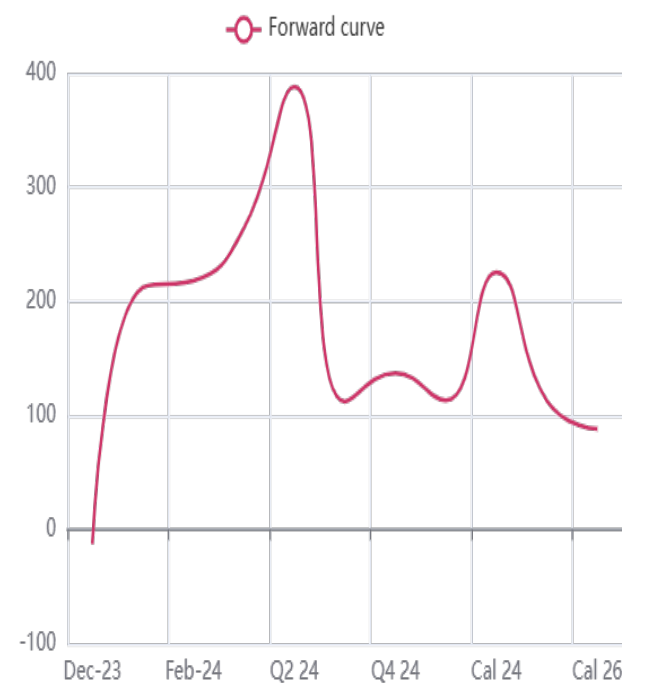
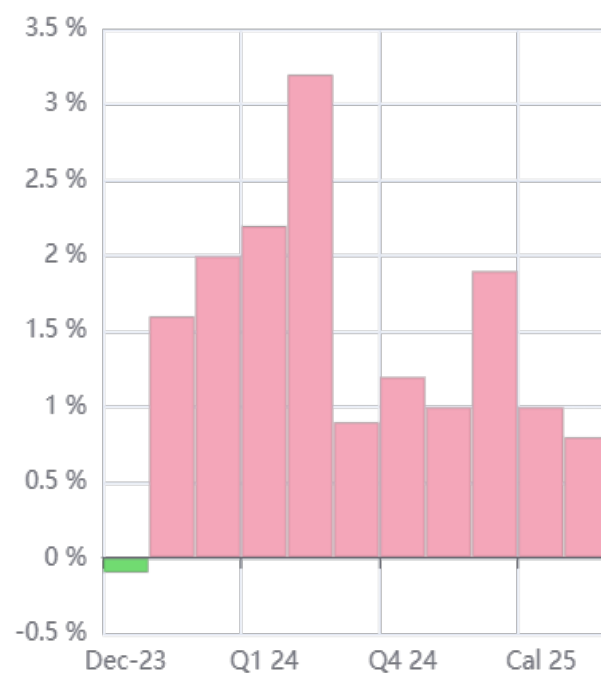
好望角型散货船Capesize

5TC	\$/day	WoW	
Dec-23	37,300.00	386.0	1.0 %
Jan-24	18,354.00	1672.0	10.0 %
Feb-24	11,636.00	904.0	8.4 %
Q1 24	14,409.67	1093.0	8.2 %
Q2 24	17,821.00	692.0	4.0 %
Q3 24	19,636.00	357.0	1.9 %
Q4 24	20,218.00	275.0	1.4 %
Q1 25	12,536.00	322.0	2.6 %
Cal 24	18,021.17	604.25	3.5 %
Cal 25	16,899.75	413.75	2.5 %
Cal 26	17,018.00	236.0	1.4 %



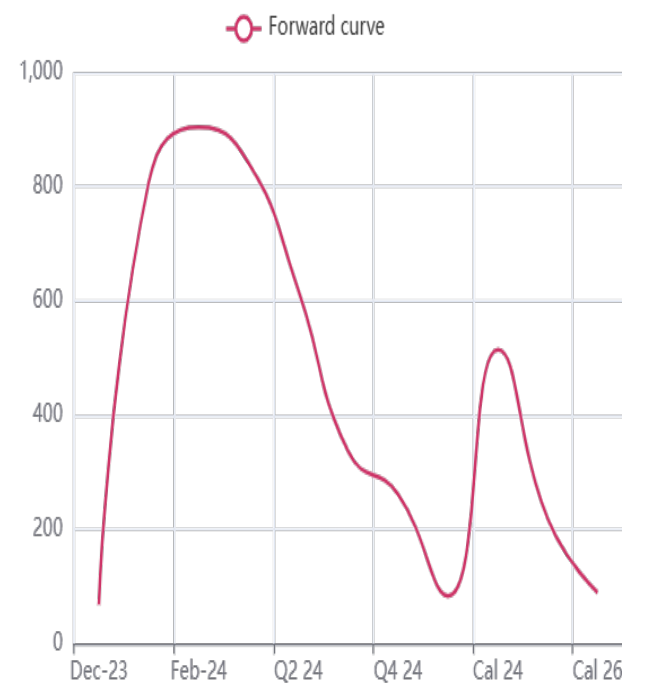
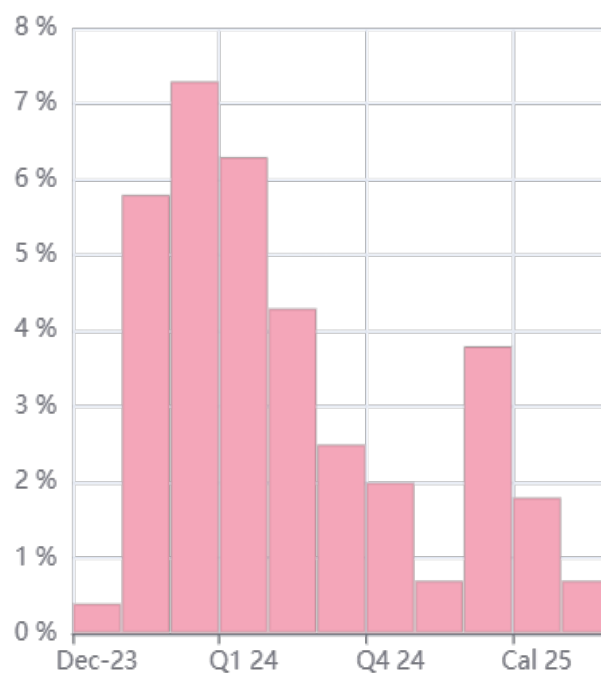
灵便型散货船Handysize

7TC	\$/day	WoW	
Dec-23	15,600.00	-13.0	-0.1 %
Jan-24	13,275.00	212.0	1.6 %
Feb-24	11,281.00	218.0	2.0 %
Q1 24	12,343.67	264.0	2.2 %
Q2 24	12,563.00	388.0	3.2 %
Q3 24	11,975.00	112.0	0.9 %
Q4 24	11,625.00	137.0	1.2 %
Q1 25	11,413.00	113.0	1.0 %
Cal 24	12,126.67	225.25	1.9 %
Cal 25	11,413.00	113.0	1.0 %
Cal 26	11,338.00	88.0	0.8 %



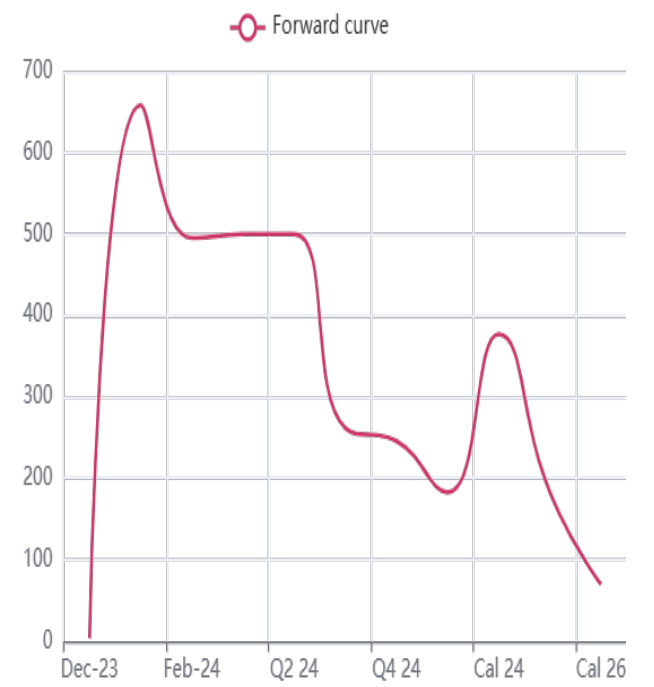
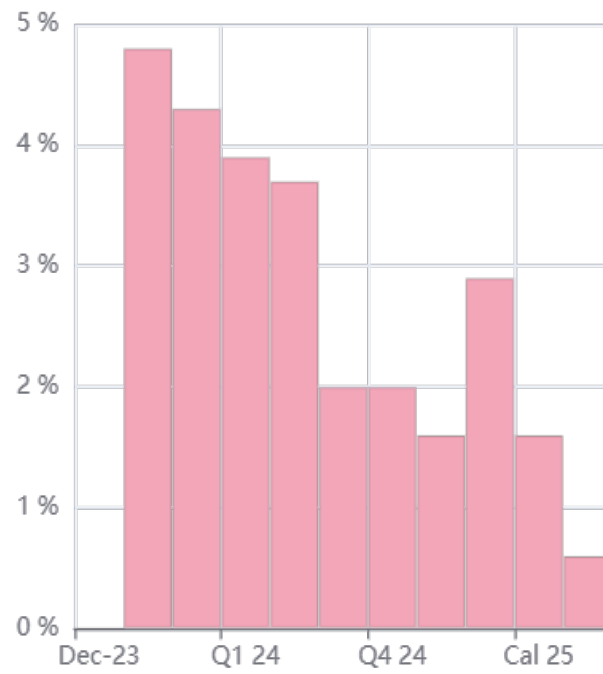
巴拿马型散货船Panamax

4TC	\$/day	WoW	
Dec-23	17,432.00	68.0	0.4 %
Jan-24	14,686.00	807.0	5.8 %
Feb-24	13,229.00	904.0	7.3 %
Q1 24	14,112.00	841.67	6.3 %
Q2 24	14,868.00	618.0	4.3 %
Q3 24	13,882.00	336.0	2.5 %
Q4 24	13,175.00	261.0	2.0 %
Q1 25	11,404.00	83.0	0.7 %
Cal 24	14,009.25	514.17	3.8 %
Cal 25	12,204.00	218.25	1.8 %
Cal 26	11,964.00	89.0	0.7 %



超大灵便型散货船Supramax

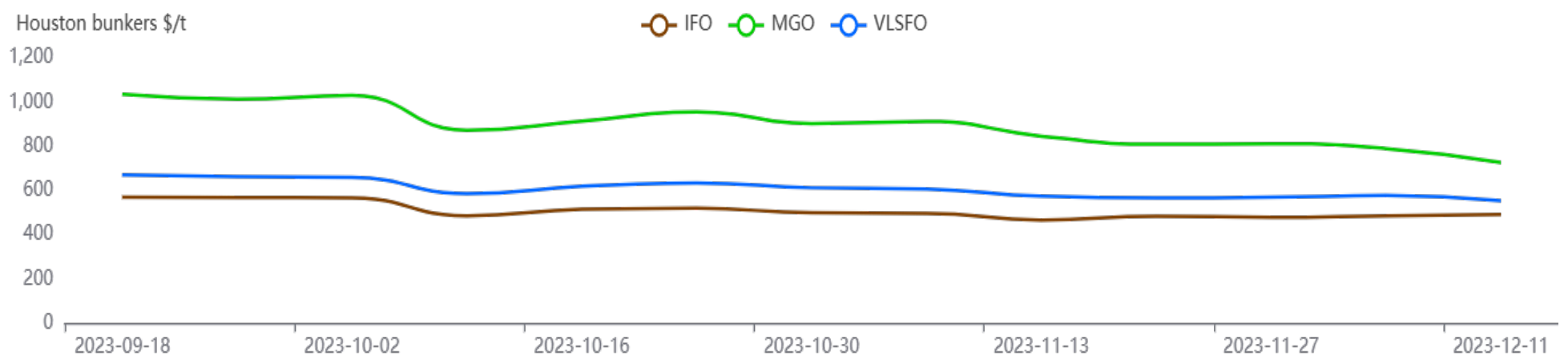
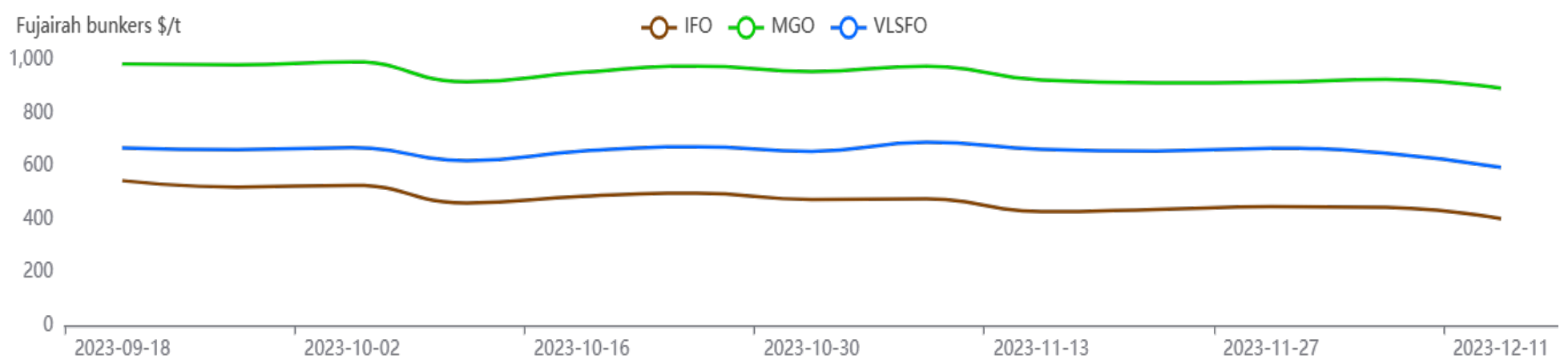
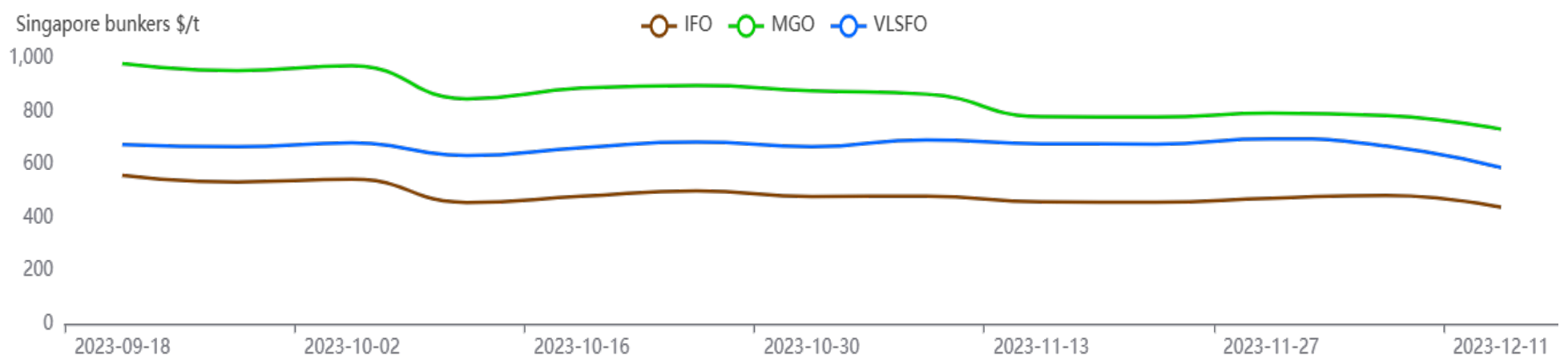
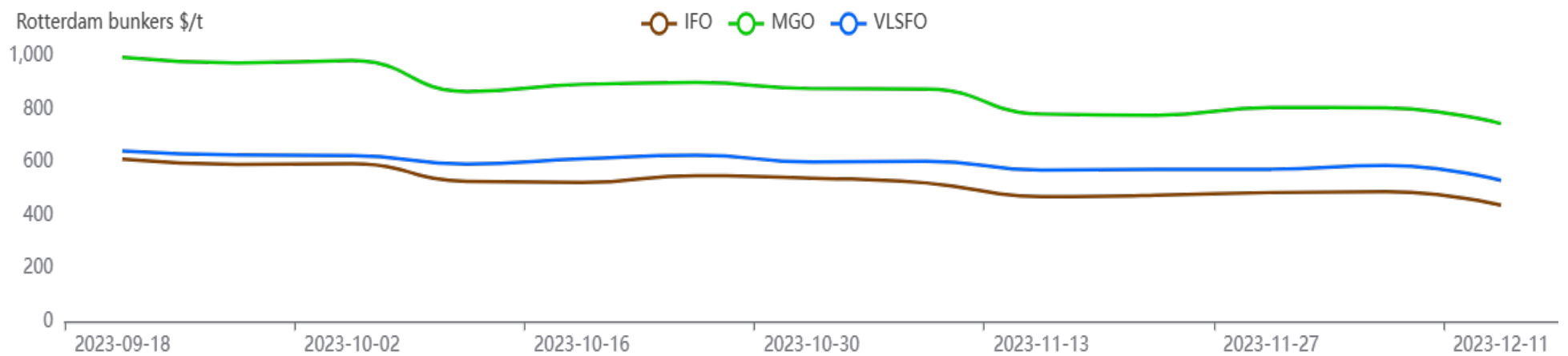
10TC	\$/day	WoW	
Dec-23	16,354.00	4.0	0.0 %
Jan-24	14,246.00	658.0	4.8 %
Feb-24	12,108.00	495.0	4.3 %
Q1 24	13,257.00	499.67	3.9 %
Q2 24	13,917.00	500.0	3.7 %
Q3 24	13,229.00	262.0	2.0 %
Q4 24	12,771.00	246.0	2.0 %
Q1 25	11,933.00	183.0	1.6 %
13,293.50	Cal 24	376.92	2.9 %
Cal 25	11,933.00	183.0	1.6 %
Cal 26	11,858.00	70.0	0.6 %



第六部分 燃油价格 BUNKER PRICE

MP	LO	HO	MO	SP	WoW	W%	M%
zhoushan	614.0	450.0	788.0	164.0	-28.0	-14.58	-16.54
Singapore	589.0	439.5	734.0	149.5	-36.5	-19.62	-31.74
Rotterdam	532.5	438.5	746.0	94.0	-5.0	-5.05	-6.0
Fujairah	596.0	403.0	895.0	193.0	-11.0	-5.39	-18.05
Houston	553.0	491.0	726.0	62.0	-30.5	-32.97	-42.59

(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		226.0	-0.72	-0.32	1.35	-22.46
Maize		232.44	-0.69	-0.3	3.97	-23.4
Soybeans		254.4	-0.85	-0.33	-2.77	-14.71
Rice		254.3	0.95	0.37	5.02	35.74
Barley		222.85	-0.56	-0.25	0.53	-27.67
Energy		Index	+/-	Weekly	Monthly	YTD
Crude Oil	USD/Bbl	70.69	-2.29	-3.14	-7.61	-12.34
Brent	USD/Bbl	75.48	-2.29	-2.94	-6.42	-12.48
Natural Gas	USD/MMBtu	2.4	-0.3	-11.11	-24.29	-59.53
Gasoline	USD/Gal	2.05	-0.05	-2.38	-4.65	-10.87
Heating Oil	USD/Gal	2.58	-0.06	-2.27	-4.8	-18.87
Ethanol	USD/Gal	1.73	-0.07	-3.89	-6.99	-21.0
Naphtha	USD/T	622.21	-9.61	-1.52	-0.06	-1.59
Propane	USD/Gal	0.69	-0.02	-2.82	9.52	-4.17
Uranium	USD/Lbs	81.45	0.45	0.56	10.59	65.55
Methanol	CNY/T	2438.0	-14.0	-0.57	-0.89	-5.58
TTF Gas	EUR/MWh	36.59	-5.43	-12.92	-20.46	-74.82
UK Gas	GBP/thm	92.23	-13.89	-13.09	-20.08	-74.02
Industrial		Index	+/-	Weekly	Monthly	YTD
Copper	USD/Lbs	3.79	-0.04	-1.04	4.7	-2.07
Coal	USD/T	151.0	17.5	13.11	22.47	-61.38
Steel	CNY/T	3987.0	90.0	2.31	2.55	7.12
Iron Ore	USD/T	137.5	4.5	3.38	5.77	29.11
Aluminum	USD/T	2129.5	-71.0	-3.23	-3.95	-16.34
Iron Ore Fe 62%	USD/T	2129.5	-71.0	-3.23	-3.95	-16.34
Metals		Index	+/-	Weekly	Monthly	YTD
Gold	USD/t.oz	1992.3	-75.3	-3.64	2.81	10.79
Silver	USD/t.oz	22.91	-2.26	-8.98	3.99	-0.82
Platium	USD/t.oz	919.8	-3.5	-0.38	8.79	-9.49
Currencies		Index	+/-	Weekly	Monthly	YTD
EUR/USD		1.08	-0.01	-0.92	0.93	2.86
USD/CNY		7.19	0.05	0.7	-1.51	3.3

第八部分 本周话题 WEEKLY TOPIC



那些最近一年在苏伊士运河搁浅的船舶

海运界应该依然记得2021年3月一艘20124 箱位集装箱船‘长赐’轮(Ever Given, 2018年建造)在巴拿马运河搁浅了6天, 对世界贸易产生了巨大的连锁影响, 这一灾难性事件发生后, 任何大型货轮在巴拿马运河的搁浅都不可避免地使巴拿马运河当局 (SCA) 处于红色警戒状态。因此此事件遭受了巨大损失的马士基在2023年2月向哥本哈根一家法院提起赔偿诉讼, 要求该船的船东、租家和船舶管理公司赔偿, 据说该赔偿金额达4400万美金。今年12月1号马士基声称已经撤销之前的赔偿请求, 然而该集团不愿透露和解协议的细节。

显然苏伊士运河船舶搁浅有时会给船东带来很多麻烦, 甚至巨大损失。回顾2023年, 到目前大家能看到报道的苏伊士运河船舶搁浅已经达到7件。2023年2月1日, 一艘液化天然气运输船 (173955立方, 2021年制造) 在苏伊士运河北端搁浅; 2023年3月6日, 地中海航运公司的一艘巨型集装箱船 (16652箱位, 2015造) 在苏伊士运河搁浅了几个小时; 2023年4月14号, 一艘Torm的成品油轮 (73000载重吨, 2003年造) 在苏伊士运河短暂搁浅; 2023年5月25号, 一艘中国航运公司的超大灵便散货船在苏伊士运河短暂搁浅; 2023年6月5号, 一艘SUEZMAX油轮 (159000载重吨, 2016年造) 在苏伊士运河主机故障后短暂搁浅; 2023年8月22日, 一艘由BW LNG控制的液化天然气运输船 (147000立方, 2021年造) 在苏伊士运河搁浅了几个小时, 并与一艘成品油油轮发生轻微碰撞。最近一起船舶搁浅发生在12月6日, 据hiFleet大数据显示, 这艘8,760箱位的集装箱船(2008年建造)在向北穿过运河前往荷兰的途中, 由于船舵失灵, 撞上了一座浮桥并搁浅。

从数据看, 苏伊士运河船舶搁浅显然是船东面临主要的挑战, 通过运河前除了确保船舶的操作性和机器一切正常外, 还有一点需要特别重视, 就是驾驶台不能过度信任引航员。因为不少搁浅案例调查的结果指向引航员的措施多多少少对船舶搁浅有所贡献。

In March 2021, the Ever Given (built in 2018), a 20124-teu container, ran aground in the Panama Canal for six days, which had a huge knock-on effect on world trade. The grounding of any large cargo ship in the Panama Canal inevitably puts the Panama Canal Authority (SCA) on red alert. Maersk, who suffered huge losses as a result of the incident, filed a lawsuit in February 2023 in a Copenhagen court, seeking compensation from the ship's owner, charterer and ship management company, reportedly amounting to \$44 million. On December 1st Maersk said it had withdrawn its claim, however the group would not disclose details of the settlement.

Obviously, the grounding of ships in the Suez Canal sometimes brings a lot of trouble and even huge losses to the shipowners. Looking back to 2023, so far we can see the reported vessel grounding in the Suez Canal has reached seven. On February 1, 2023, an LNG carrier (173,955 cubic meters, built in 2021) ran aground at the northern end of the Suez Canal; On March 6, 2023, a huge container (16,652 teu, 2015 built) of the MSC ran aground in the Suez Canal for several hours; On April 14, 2023, a Torm product tanker (73,000 DWT, built in 2003) ran aground briefly in the Suez Canal; On May 25, 2023, a Chinese shipping company's Supramax ran aground briefly in the Suez Canal; On June 5, 2023, a SUEZMAX tanker (159,000 DWT, 2016 built) ran aground briefly in the Suez Canal after main-engine failure; On August 22, 2023, an LNG carrier (147,000 cubic meters, built in 2021) controlled by BW LNG ran aground in the Suez Canal for several hours and had a minor collision with a products tanker. The most recent grounding occurred on December 6, as hiFleet shipping big data shows a 8,760-teu container (built in 2008) was heading north through the canal to the Netherlands when it hit a pontoon bridge and ran aground due to rudder failure.

Base on the data, the Suez Canal ship grounding is obviously the main challenge to owners, in addition to ensuring the operation of the ship and all the machinery is normal before passing the canal, there is another point that needs to be paid special attention as well, that is the bridge teams should not be overconfident in assessing a pilot's abilities. Because the results of the investigation of some stranding cases pointed to the pilot's inappropriate behavior to some extent contributed to the grounding.