



2023年 第50周市场周报

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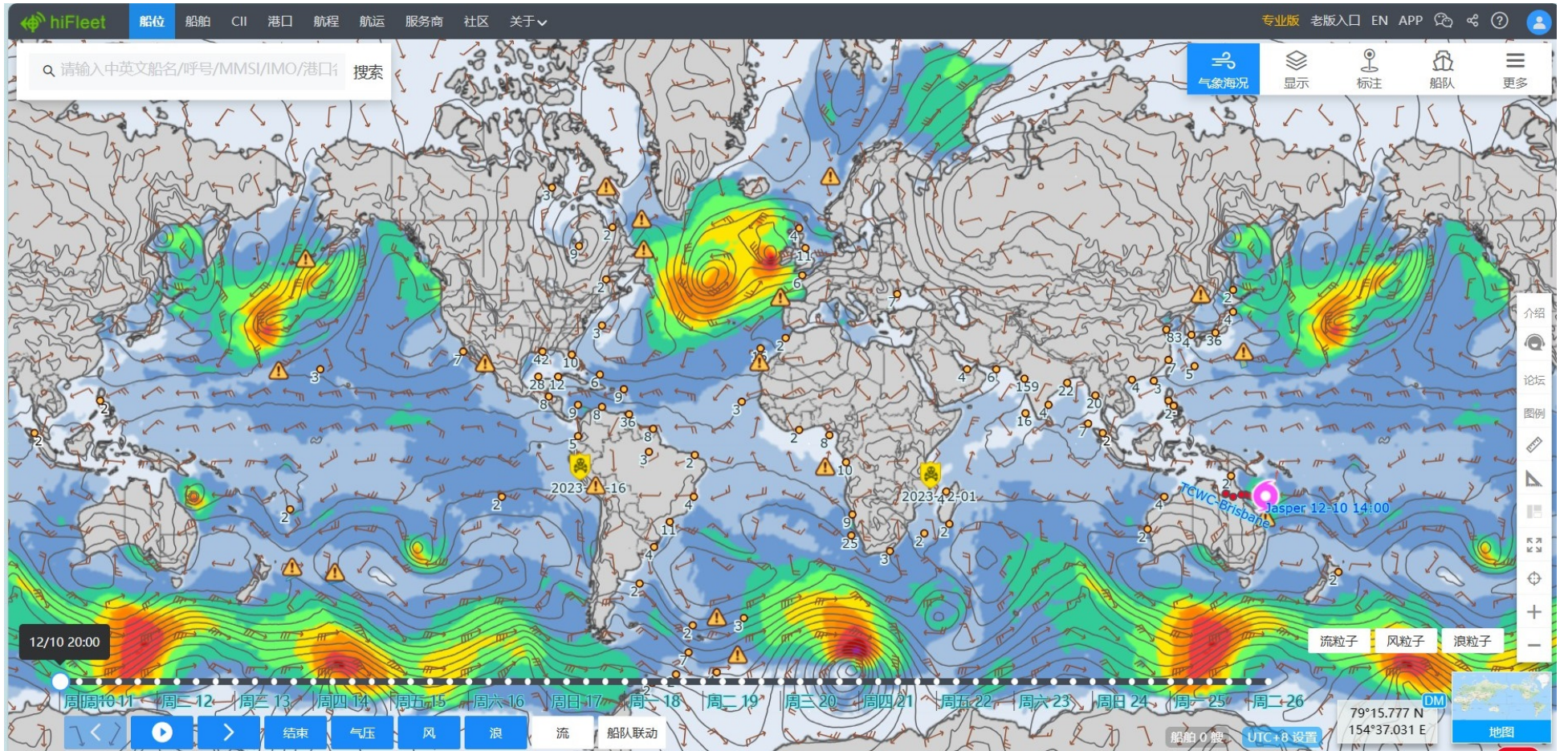
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本周话题 WEEKLY TOPIC

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790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 790 navigational warnings in effect around the ocean on hiFleet with the Far East, US Gulf and around the coastal of Caribbean Sea 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01号莫桑比克纳卡拉锚地。一艘停泊的成品油轮上的值班船员发现船尾楼的货物不见了，于是进行了搜查，船上未发现非法人员。The latest piracy reports within the week happened in : 01.12.2023: 2110 UTC: Posn: 14:32.4S - 040:39.1E, Nacala Anchorage, Mozambique. Duty crew onboard an anchored product tanker noticed the aft station stores missing. A search was carried out. No unauthorised persons found on board.

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6-7级逐步转弱到4-5级，相关海域海浪将从3.5米的巨浪到1.0米轻浪；台湾海峡风力从弱到强，风力从3-4级增强到7-8级，台湾海峡洋面海浪从1.0米轻浪发展到3-4米大浪，南海大部海域风力由3-4级增强到5-6级，海浪从1米轻浪发展到3米大浪。大西洋北部区域低压加强，太平洋北部低压活动频繁，相关海域海况正在变得恶劣。In the coming week the wind in China's Bohai Sea, East Chia Sea and Yellow Sea will gradually weaken from near gale to moderate, and the seas in the relevant waters will be from rough sea to slight. The wind in the Taiwan Strait has increased from slight to strong, with the wind increasing from moderate to gale. The sea in the Taiwan Strait will increase from slight to rough. In most of the South China Sea the wind will increase from moderate to strong breeze and the sea will increase from slight to rough. Low-pressure in the North Atlantic Ocean is becoming strengthening and Low-pressure activities in the North East Pacific is frequent, leading to deteriorating sea conditions.

海上事件 Marine Incidents

一周前一艘油轮在菲律宾海域被船员遗弃，目前竟然在越南附近搁浅。据hiFleet数据显示，这艘13925载重吨的化学品船King Rich(建于1990年)于12月1日在越南的古老占岛的岩石上被发现。A tanker has grounded off Vietnam after being abandoned by its crew in Philippines waters a week earlier. HiFleet data shows it is the 13,925-dwt chemical tank with name King Rich (built 1990) which was discovered on the rocks at Cu Lao Cham Island off Vietnam on Friday.

备注 Remark

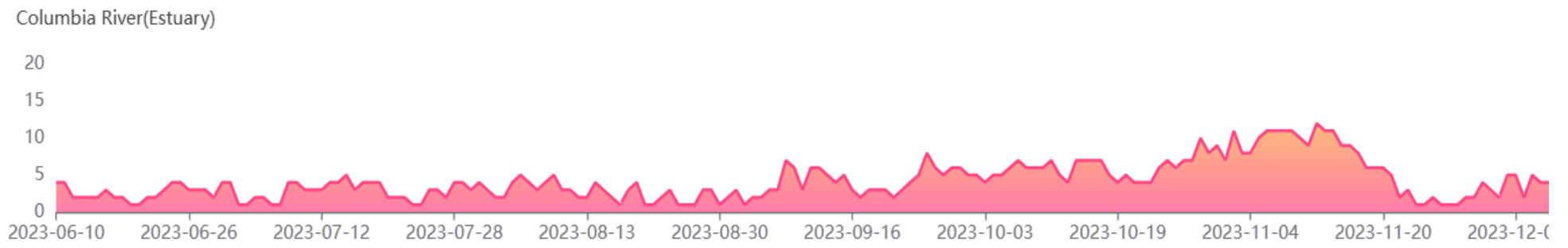
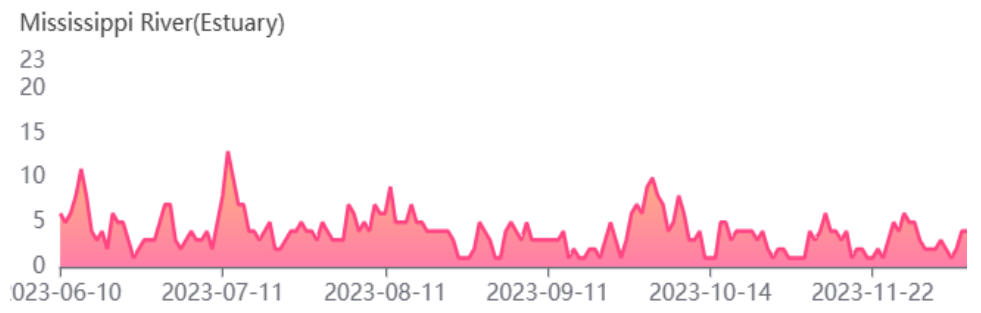
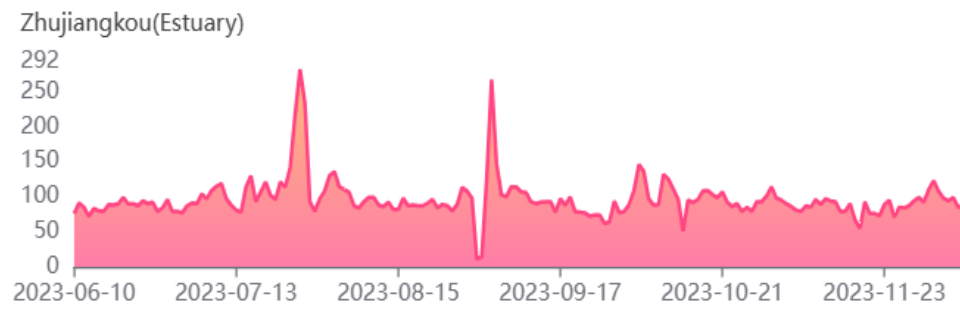
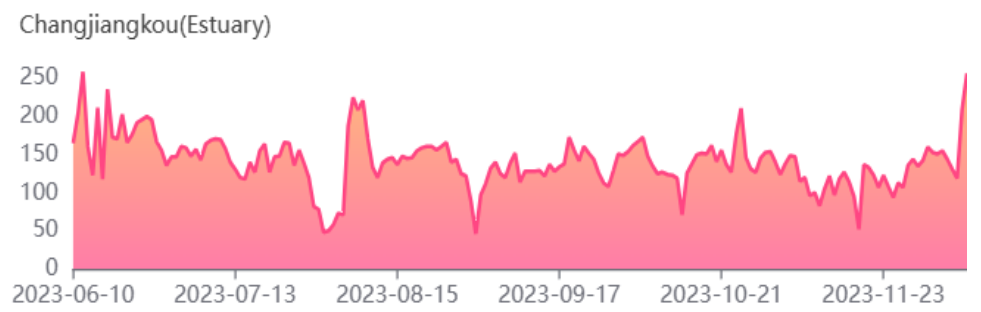
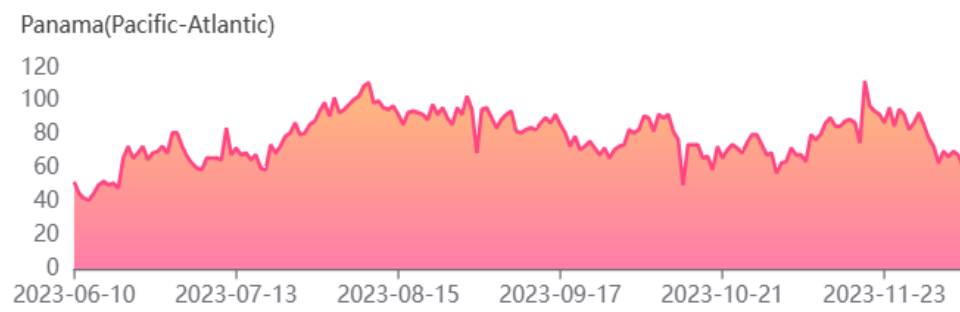
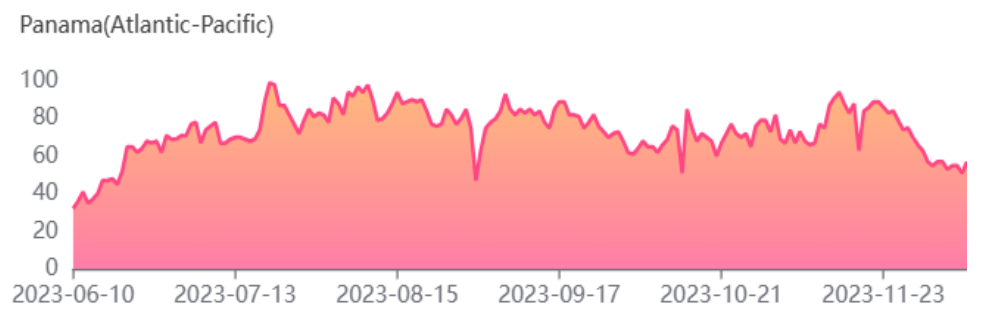
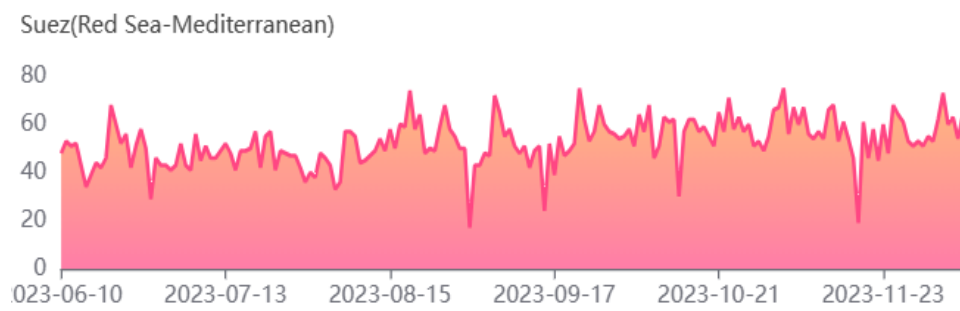
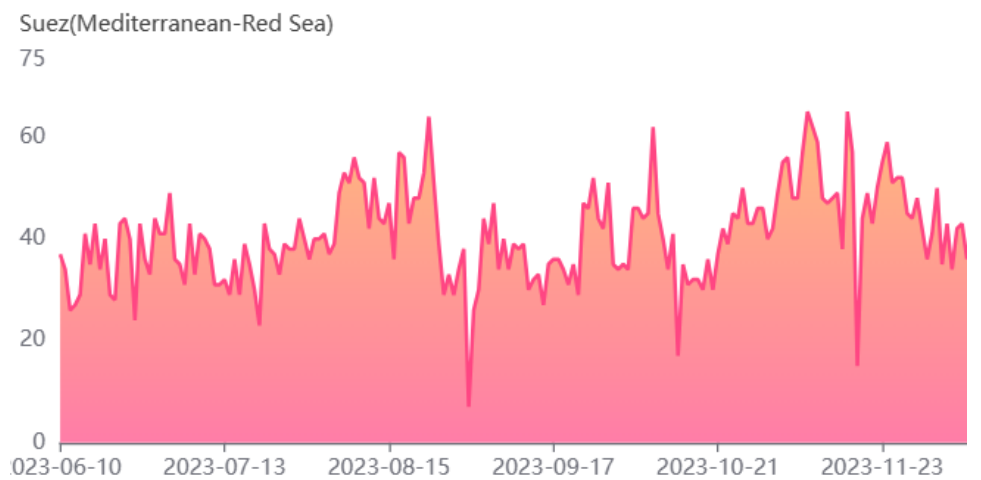
本报告数据截止时间为2023年12月10日北京时间17点；所有数据和或观点仅供参考，在任何情况下本公司及其员工不承担任何风险。The data deadline for this report is Beijing time 17 hours on December 3 of 2023; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

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 | 53 | 1623 | 41 | -107 |
| Miss.Riv. | 4 | 70 | -12 | -6 |
| CJK | 257 | 3806 | 229 | -191 |
| Pa.Atlan. | 57 | 2119 | -99 | 32 |
| Colum.Riv. | 4 | 133 | 14 | -93 |
| Suez.Med. | 36 | 1313 | -36 | 11 |
| Pa.Pac. | 67 | 2415 | -148 | 334 |
| ZJK | 86 | 2561 | 6 | -142 |

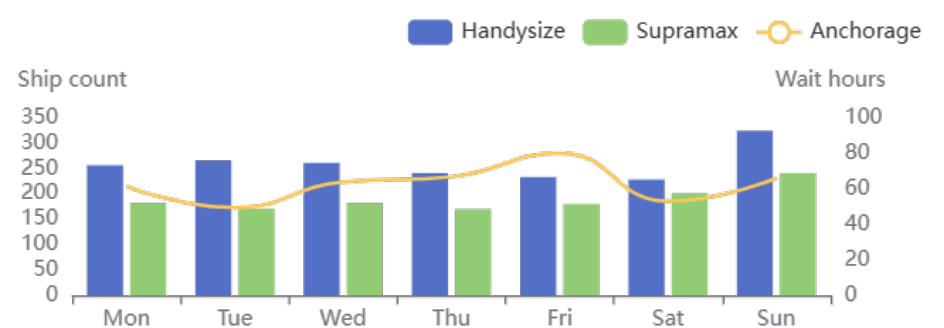


(P.N.-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

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

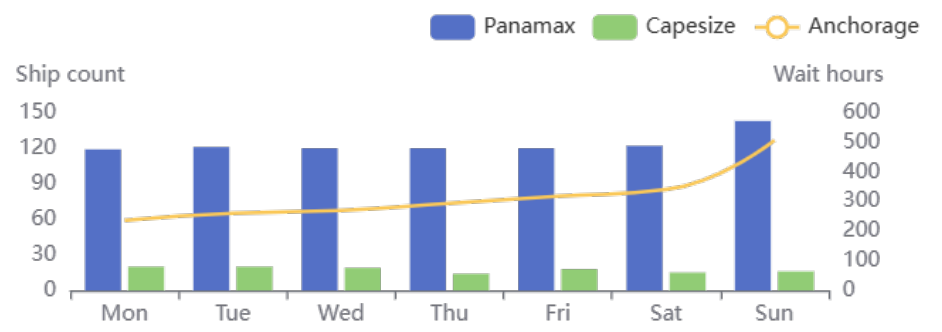
| Type | M | T | W | Th | F | Sat | Sun |
|-------|------|------|------|------|------|-----|-----|
| HDY | 256 | 266 | 261 | 241 | 233 | 228 | 324 |
| SMX | 182 | 171 | 182 | 170 | 180 | 201 | 241 |
| WT.h. | 61.3 | 49.4 | 63.8 | 66.7 | 80.1 | 53 | 66 |



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

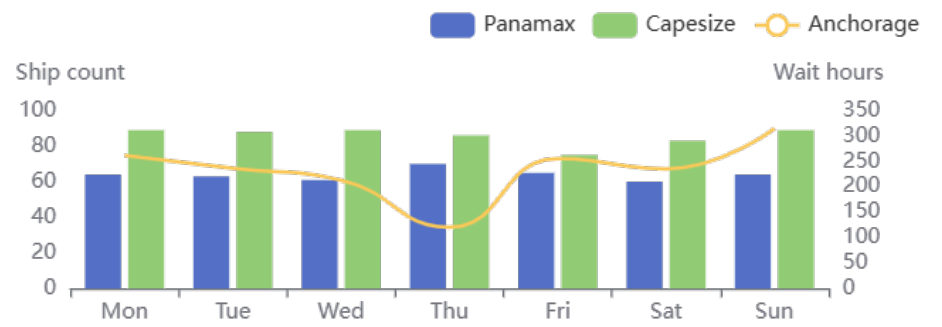
| Type | M | T | W | Th | F | Sat | Sun |
|-------|-------|-------|-------|-------|-------|-------|-----|
| Pan. | 119 | 121 | 120 | 120 | 120 | 122 | 143 |
| Cap | 20 | 20 | 19 | 14 | 18 | 15 | 16 |
| WT.h. | 236.7 | 260.7 | 270.1 | 294.1 | 318.1 | 340.4 | 507 |



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

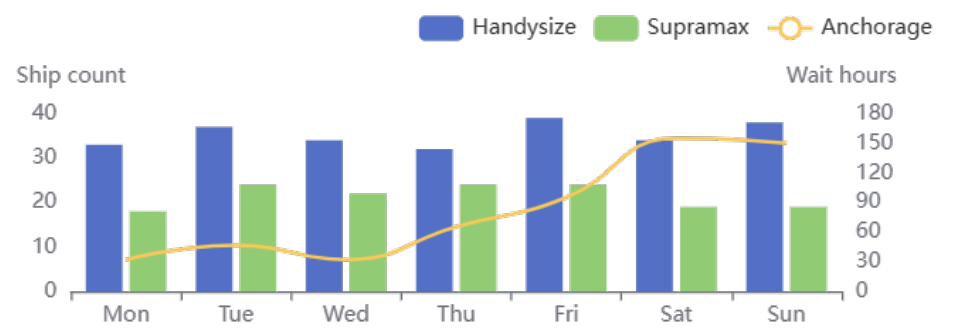
| Type | M | T | W | Th | F | Sat | Sun |
|-------|-------|-------|-------|-------|-------|-------|-----|
| Pan. | 64 | 63 | 61 | 70 | 65 | 60 | 64 |
| Cap | 89 | 88 | 89 | 86 | 75 | 83 | 89 |
| WT.h. | 262.1 | 236.6 | 212.9 | 120.4 | 255.8 | 235.5 | 315 |



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

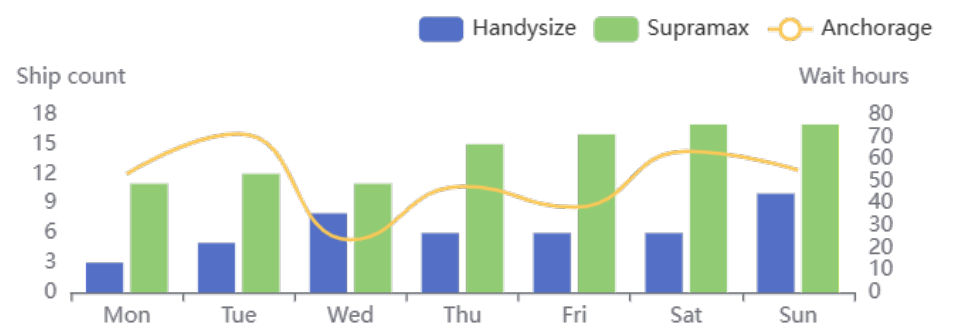
| Type | M | T | W | Th | F | Sat | Sun |
|-------|----|------|------|------|------|-------|-----|
| HDY | 33 | 37 | 34 | 32 | 39 | 34 | 38 |
| SMX | 18 | 24 | 22 | 24 | 24 | 19 | 19 |
| WT.h. | 32 | 46.9 | 32.2 | 65.5 | 95.2 | 155.2 | 150 |



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

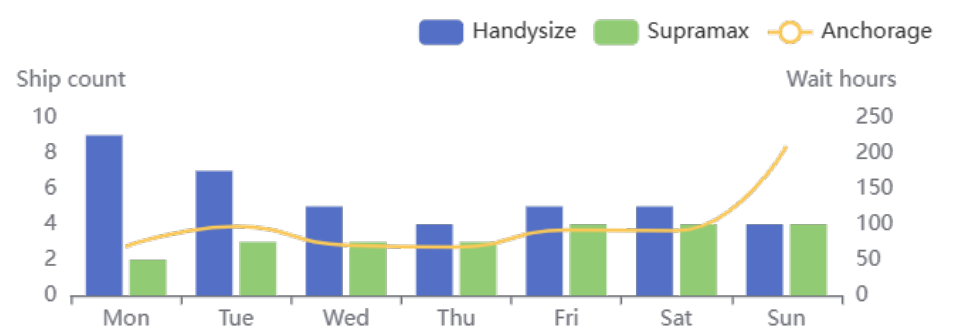
| Type | M | T | W | Th | F | Sat | Sun |
|-------|------|------|------|------|-------|------|-----|
| HDY | 3 | 5 | 8 | 6 | 6 | 6 | 10 |
| SMX | 11 | 12 | 11 | 15 | 16 | 17 | 17 |
| WT.h. | 53.3 | 71.4 | 23.7 | 47.7 | 38.35 | 63.5 | 55 |



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

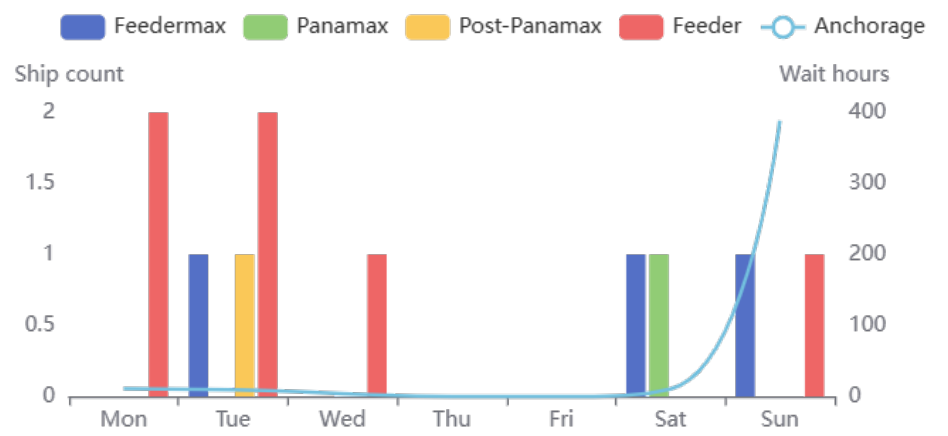
| Type | M | T | W | Th | F | Sat | Sun |
|-------|------|------|-------|----|----|------|-------|
| HDY | 9 | 7 | 5 | 4 | 5 | 5 | 4 |
| SMX | 2 | 3 | 3 | 3 | 4 | 4 | 4 |
| WT.h. | 69.1 | 96.8 | 70.65 | 68 | 92 | 91.1 | 209.5 |



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

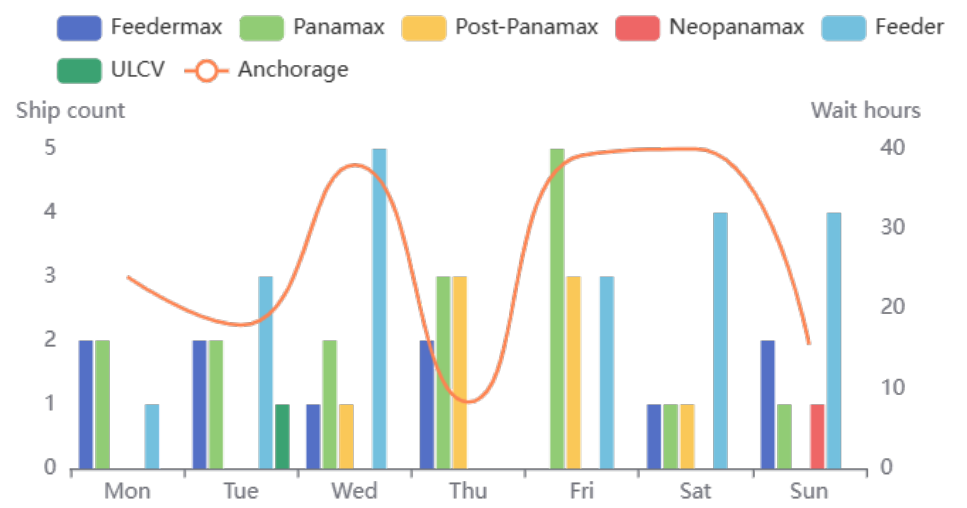
| Type | M | T | W | Th | F | Sat | Sun |
|-------|------|-----|-----|-----|-----|-------|-------|
| F.ma. | 0 | 1 | 0 | 0 | 0 | 1 | 1 |
| Pan. | 0 | 0 | 0 | 0 | 0 | 1 | 0 |
| PPx | 0 | 1 | 0 | 0 | 0 | 0 | 0 |
| NPx | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Fd | 2 | 2 | 1 | 0 | 0 | 0 | 1 |
| WT.h. | 10.8 | 9.7 | 4.2 | 0.0 | 0.0 | 10.55 | 388.5 |
| 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

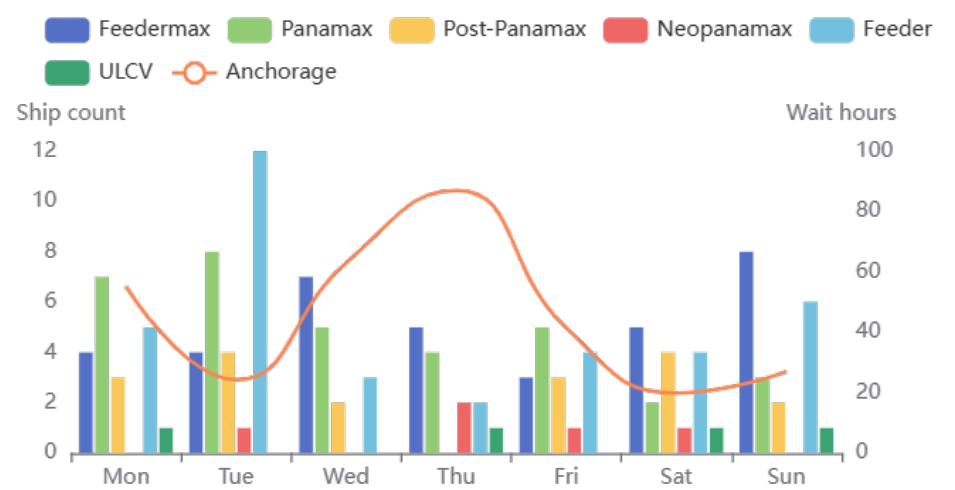
| Type | M | T | W | Th | F | Sat | Sun |
|-------|----|-------|----|-----|------|-----|------|
| F.ma. | 2 | 2 | 1 | 2 | 0 | 1 | 2 |
| Pan. | 2 | 2 | 2 | 3 | 5 | 1 | 1 |
| PPx | 0 | 0 | 1 | 3 | 3 | 1 | 0 |
| NPx | 0 | 0 | 0 | 0 | 0 | 0 | 1 |
| Fd | 1 | 3 | 5 | 0 | 3 | 4 | 4 |
| Ulcw | 0 | 1 | 0 | 0 | 0 | 0 | 0 |
| WT.h. | 24 | 17.95 | 38 | 8.3 | 39.2 | 40 | 15.5 |



最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

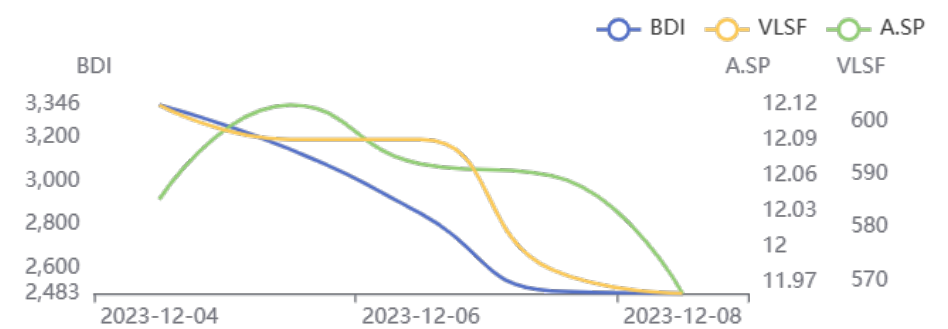
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

| Type | M | T | W | Th | F | Sat | Sun |
|-------|-------|------|----|----|-------|------|-----|
| F.ma. | 4 | 4 | 7 | 5 | 3 | 5 | 8 |
| Pan. | 7 | 8 | 5 | 4 | 5 | 2 | 3 |
| PPx | 3 | 4 | 2 | 0 | 3 | 4 | 2 |
| NPx | 0 | 1 | 0 | 2 | 1 | 1 | 0 |
| Fd | 5 | 12 | 3 | 2 | 4 | 4 | 6 |
| Ulcw | 1 | 0 | 0 | 1 | 0 | 1 | 1 |
| WT.h. | 55.25 | 24.3 | 63 | 87 | 41.45 | 19.9 | 27 |



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

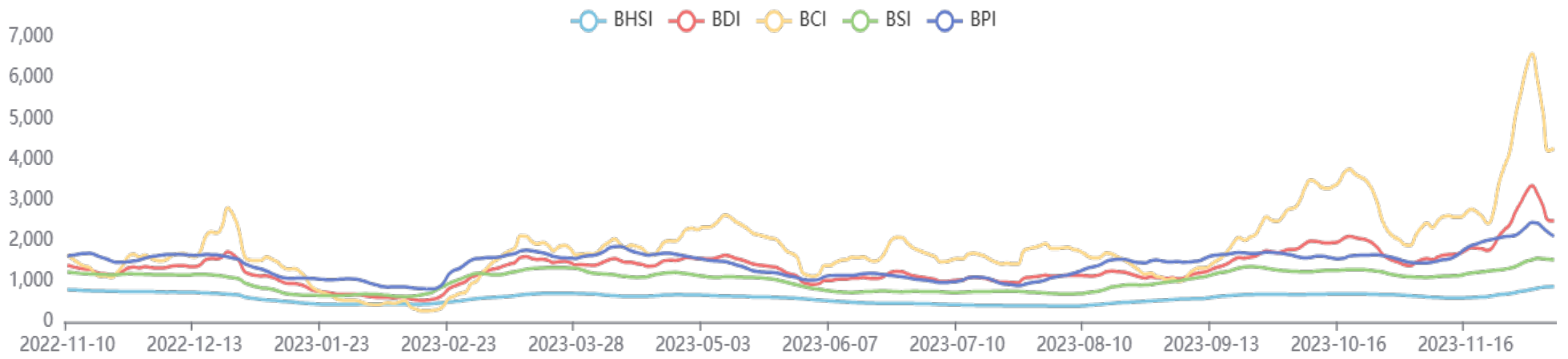
| Type | M | T | W | Th | F | Sat | Sun |
|------|-------|-------|-------|-------|-------|-------|-----|
| BDI | 2441 | 2425 | 2311 | 2197 | 2104 | | |
| VLSF | 603 | 596.5 | 596.5 | 572 | 567.5 | | |
| A.SP | 12.04 | 12.12 | 12.07 | 12.06 | 11.96 | 11.89 | |



第三部分 航运市场 SHIPPING MARKET

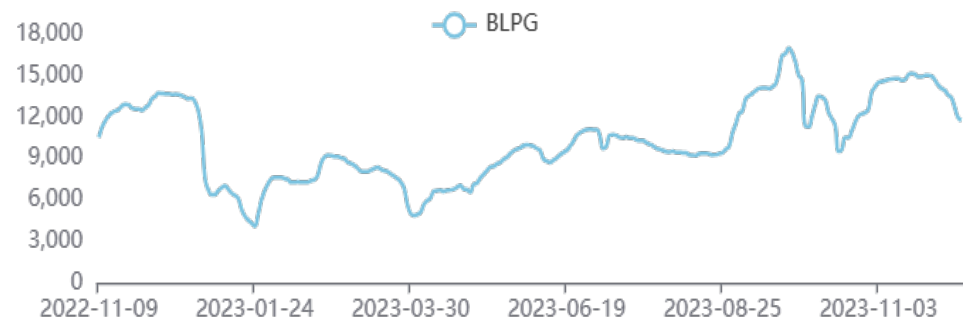
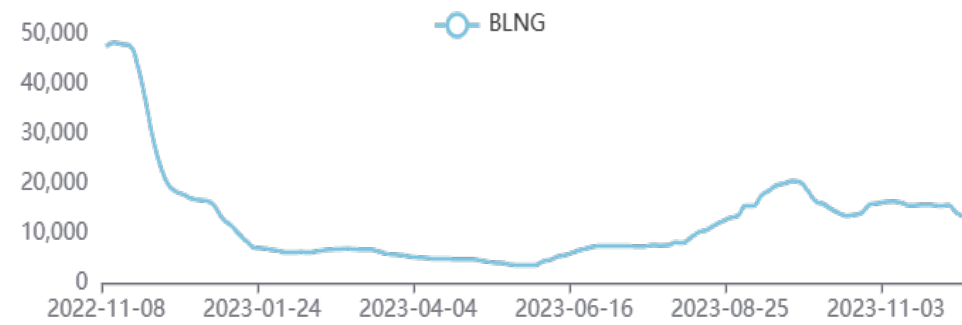
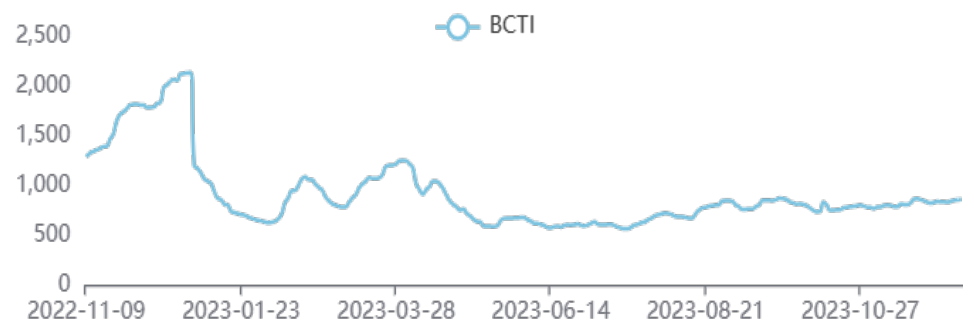
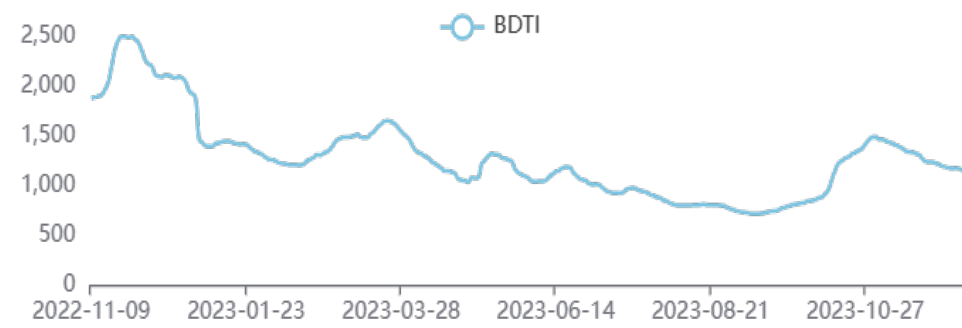
波罗的海干散货指数Baltic Dry Index

| Type | PI | WoW | W% | M% | y% |
|------|------|---------|--------|-------|--------|
| BDI | 2483 | -709.0 | -22.21 | 51.13 | 79.28 |
| BCI | 4259 | -1978.0 | -31.71 | 64.5 | 154.27 |
| BPI | 2104 | -237.0 | -10.12 | 37.52 | 26.67 |
| BSI | 1521 | 32.0 | 2.15 | 35.2 | 31.92 |
| BHSI | 872 | 99.0 | 12.81 | 46.8 | 18.96 |

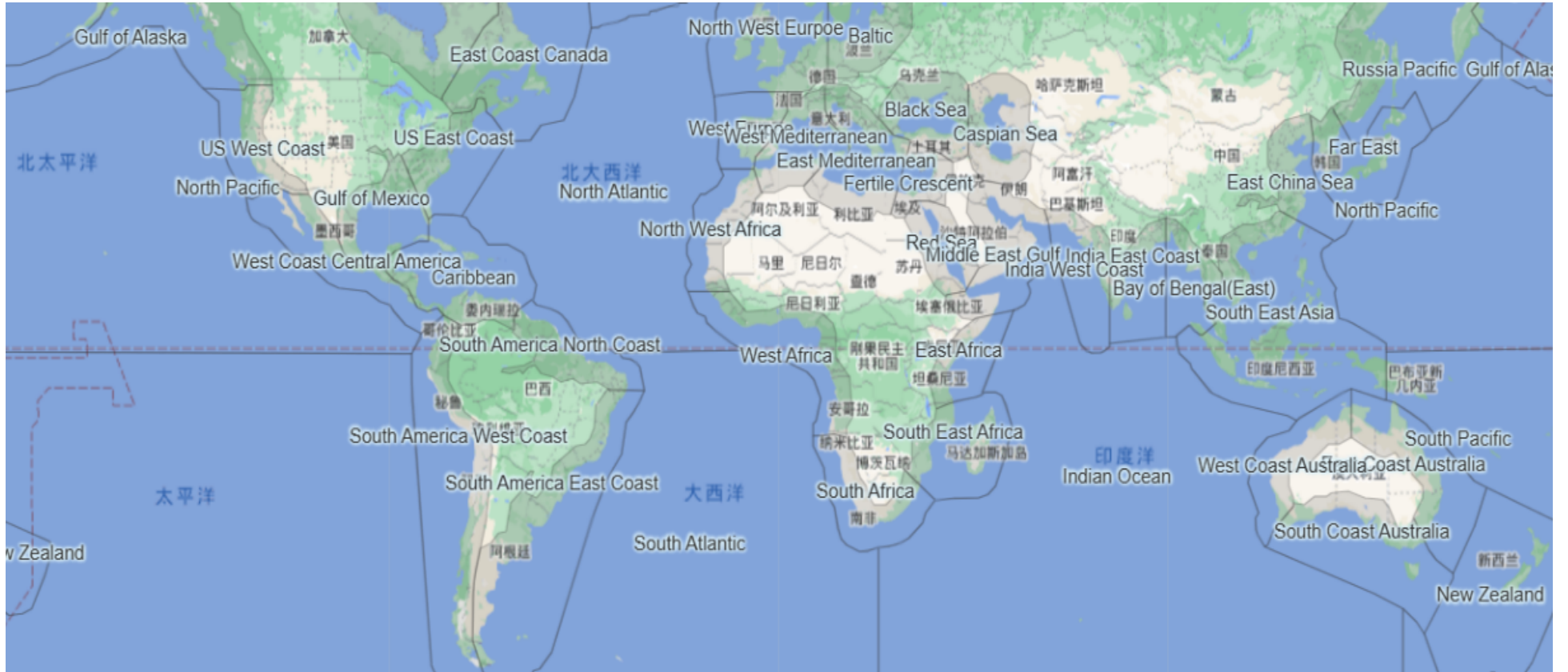


能源运价指数Energy Shipping Index

| Type | PI | WoW | W% | M% | y% |
|------|-------|---------|--------|--------|--------|
| BDTI | 1129 | -43.0 | -3.67 | -18.89 | -45.96 |
| BCTI | 858 | 25.0 | 3.0 | 9.16 | -52.86 |
| BLNG | 13348 | -2306.0 | -14.73 | -16.82 | -27.07 |
| BLPG | 11756 | -2174.0 | -15.61 | -20.4 | -14.08 |



第四部分 运力分布 SUPPLY DISTRIBUTION

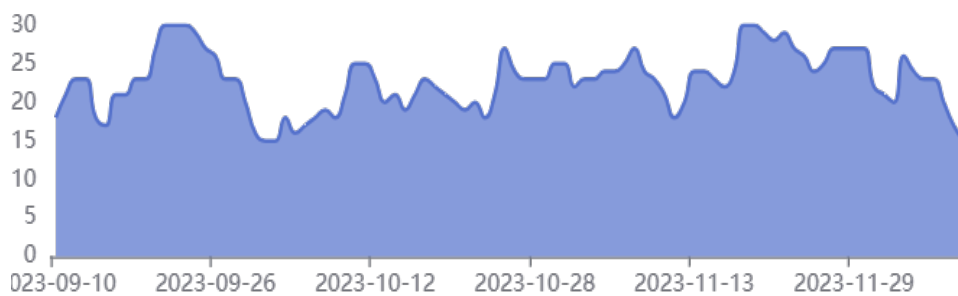


好望角型散货船 Capesize

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.

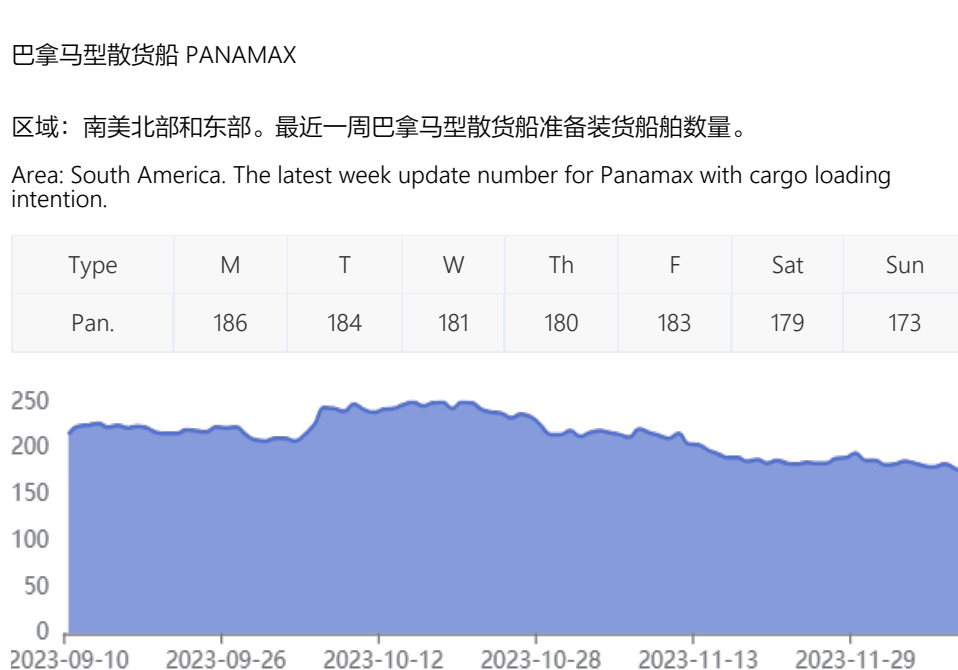
| Type | M | T | W | Th | F | Sat | Sun |
|------|----|----|----|----|----|-----|-----|
| Cape | 26 | 24 | 23 | 23 | 20 | 17 | 15 |



区域：南非，最近一周好望角型散货船准备装货船舶数量

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

| Type | M | T | W | Th | F | Sat | Sun |
|------|----|----|----|----|----|-----|-----|
| Cape | 24 | 23 | 25 | 28 | 24 | 27 | 28 |

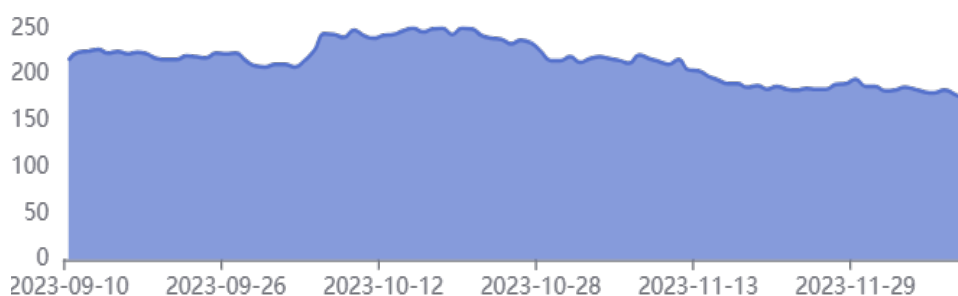


巴拿马型散货船 PANAMAX

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.

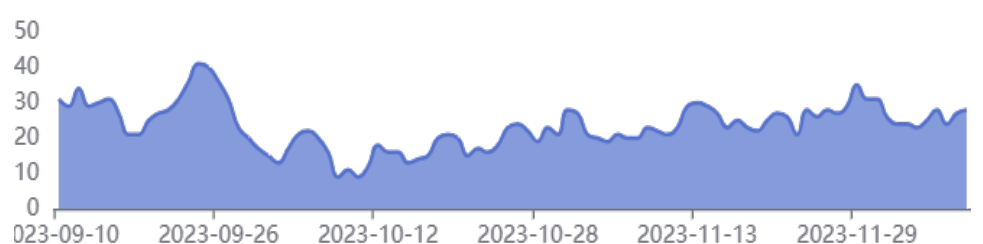
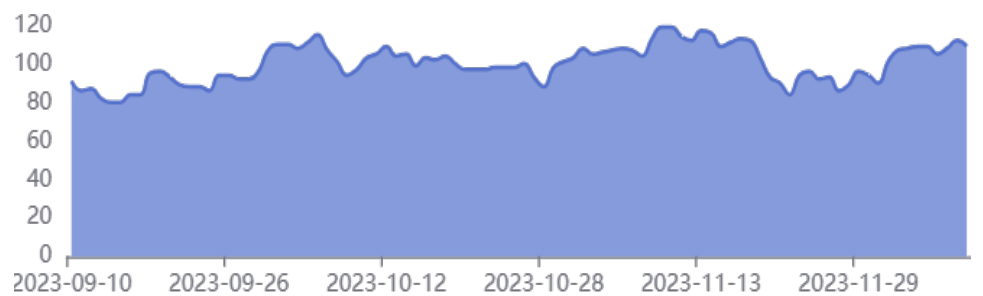
| Type | M | T | W | Th | F | Sat | Sun |
|------|-----|-----|-----|-----|-----|-----|-----|
| Pan. | 186 | 184 | 181 | 180 | 183 | 179 | 173 |



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.

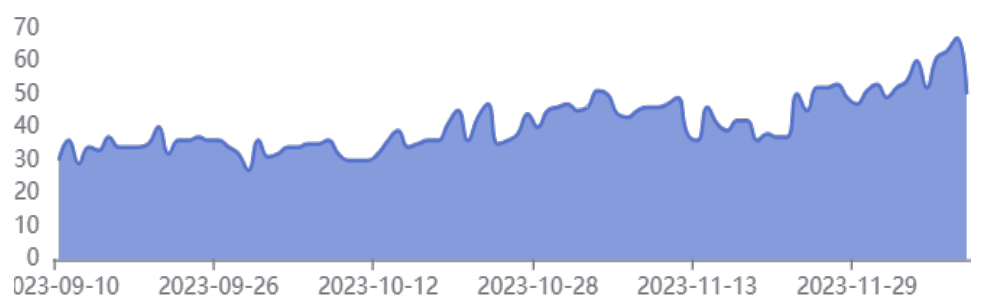
| Type | M | T | W | Th | F | Sat | Sun |
|------|-----|-----|-----|-----|-----|-----|-----|
| Cape | 108 | 109 | 109 | 105 | 108 | 112 | 109 |



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.

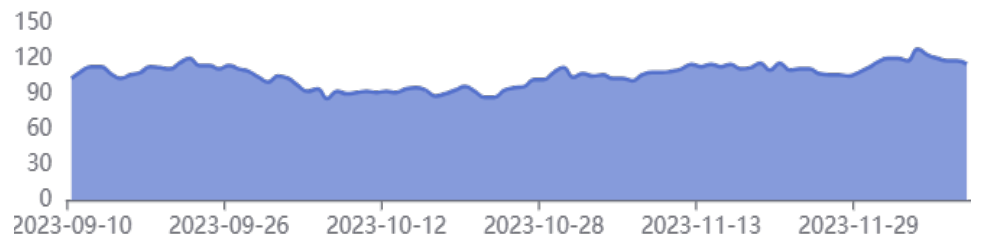
| Type | M | T | W | Th | F | Sat | Sun |
|------|----|----|----|----|----|-----|-----|
| Pan. | 45 | 47 | 44 | 48 | 53 | 51 | 47 |



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. | 118 | 128 | 123 | 120 | 118 | 118 | 115 |

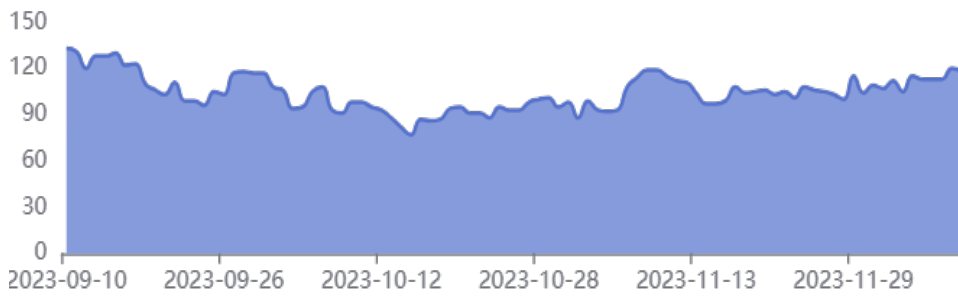


超大灵便型散货 SUPRAMAX

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.

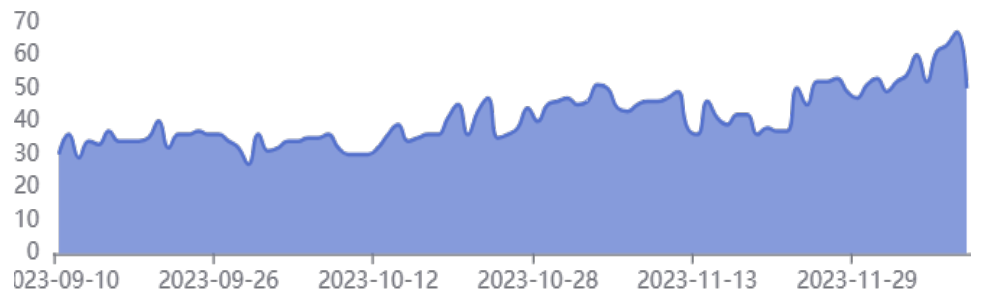
| Type | M | T | W | Th | F | Sat | Sun |
|------|-----|-----|-----|-----|-----|-----|-----|
| SMX | 105 | 115 | 113 | 113 | 113 | 120 | 118 |



区域：黑海。最近一周巴拿马型散货船准备装货船舶数量。

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

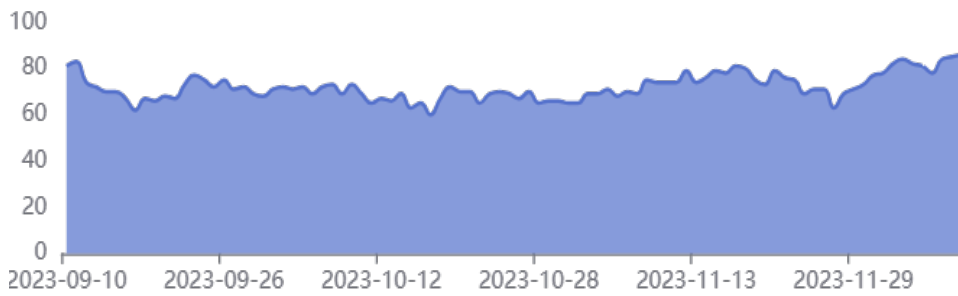
| Type | M | T | W | Th | F | Sat | Sun |
|------|----|----|----|----|----|-----|-----|
| SMX | 54 | 60 | 52 | 61 | 63 | 67 | 50 |



区域：美湾。最近一周超大灵便型散货船准备装货船舶数量。

Area: US Gulf. The latest week update number for Supramax with cargo loading intention.

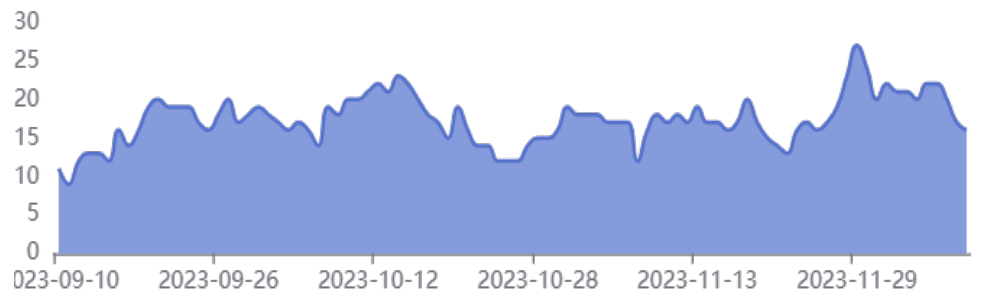
| Type | M | T | W | Th | F | Sat | Sun |
|------|----|----|----|----|----|-----|-----|
| SMX | 21 | 20 | 22 | 22 | 20 | 17 | 16 |



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.

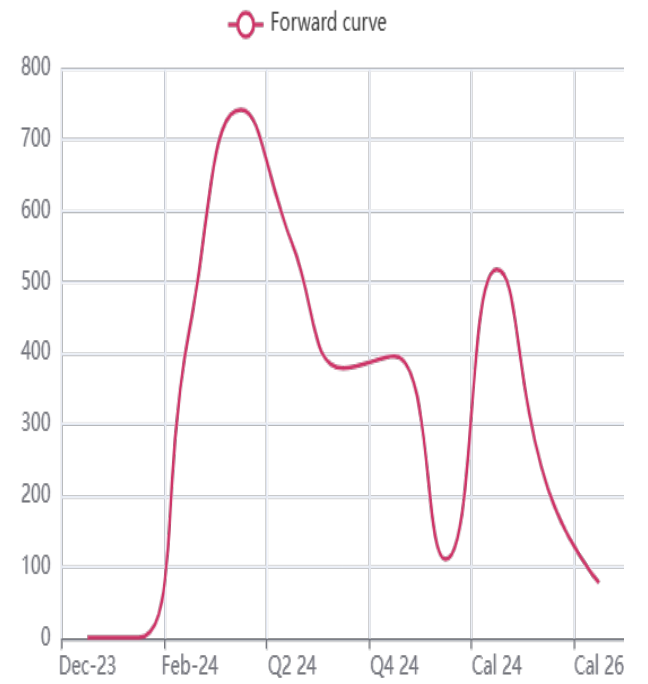
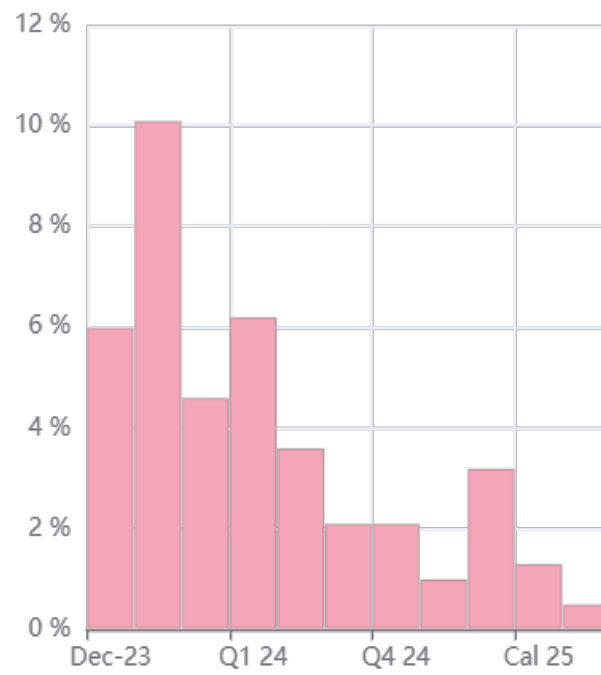
| Type | M | T | W | Th | F | Sat | Sun |
|------|----|----|----|----|----|-----|-----|
| SMX | 84 | 82 | 81 | 78 | 84 | 85 | 86 |



第五部分 远期运价协议 FFA

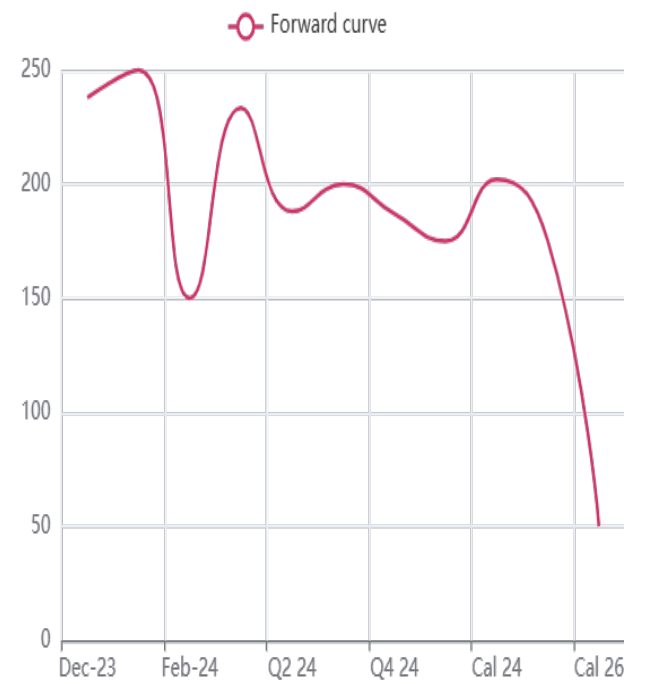
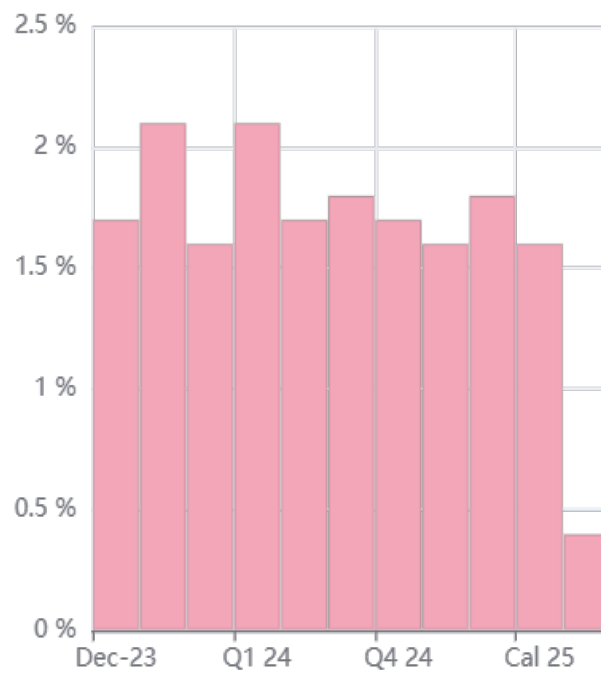
好望角型散货船Capesize

| 5TC | \$/day | WoW | |
|--------|-----------|--------|--------|
| Dec-23 | 32,296.00 | 1825.0 | 6.0 % |
| Jan-24 | 16,164.00 | 1485.0 | 10.1 % |
| Feb-24 | 9,900.00 | 436.0 | 4.6 % |
| Q1 24 | 12,713.00 | 741.67 | 6.2 % |
| Q2 24 | 15,968.00 | 554.0 | 3.6 % |
| Q3 24 | 18,829.00 | 379.0 | 2.1 % |
| Q4 24 | 19,489.00 | 396.0 | 2.1 % |
| Q1 25 | 11,643.00 | 111.0 | 1.0 % |
| Cal 24 | 16,749.75 | 517.67 | 3.2 % |
| Cal 25 | 16,170.75 | 210.0 | 1.3 % |
| Cal 26 | 16,446.00 | 78.0 | 0.5 % |



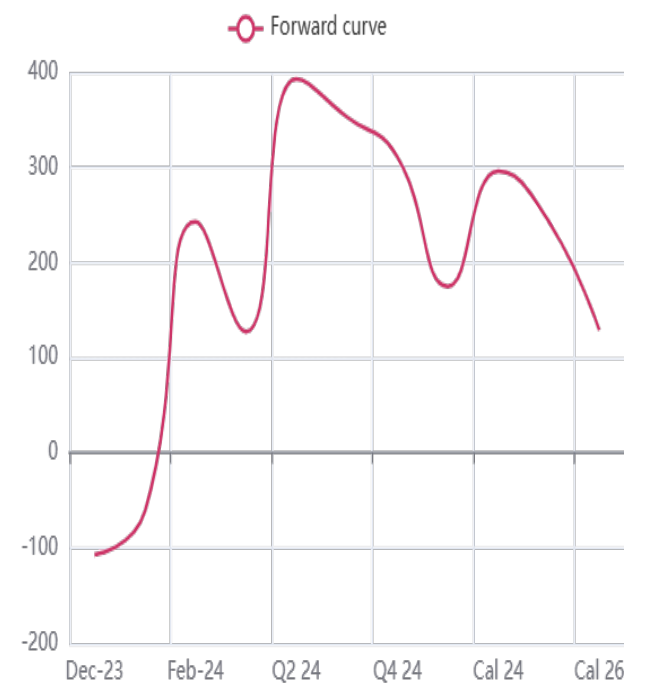
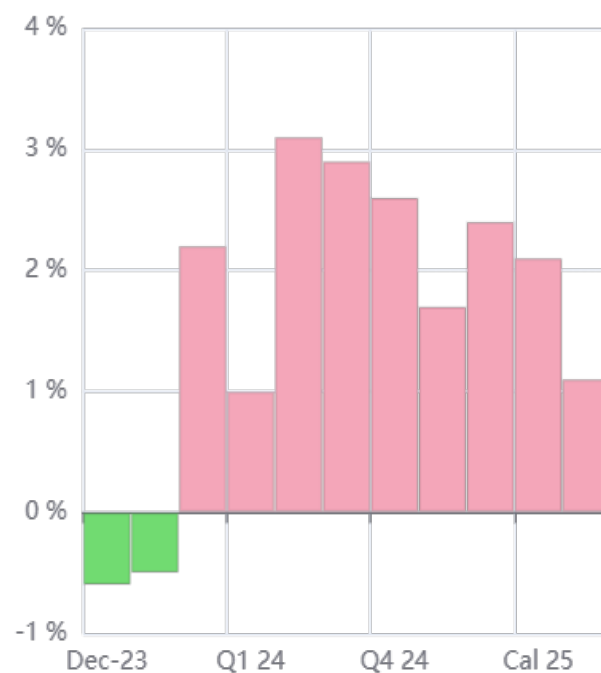
灵便型散货船Handysize

| 7TC | \$/day | WoW | |
|--------|-----------|--------|-------|
| Dec-23 | 14,444.00 | 238.0 | 1.7 % |
| Jan-24 | 12,188.00 | 250.0 | 2.1 % |
| Feb-24 | 9,713.00 | 150.0 | 1.6 % |
| Q1 24 | 11,217.00 | 233.33 | 2.1 % |
| Q2 24 | 11,388.00 | 188.0 | 1.7 % |
| Q3 24 | 11,350.00 | 200.0 | 1.8 % |
| Q4 24 | 10,975.00 | 187.0 | 1.8 % |
| Q1 25 | 10,850.00 | 175.0 | 1.6 % |
| Cal 24 | 11,232.50 | 202.08 | 1.8 % |
| Cal 25 | 10,850.00 | 175.0 | 1.6 % |
| Cal 26 | 11,163.00 | 50.0 | 0.4 % |



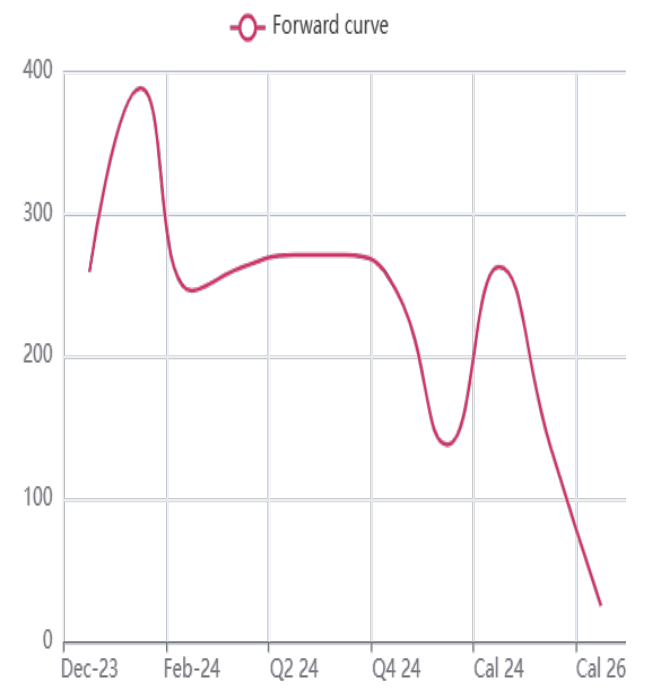
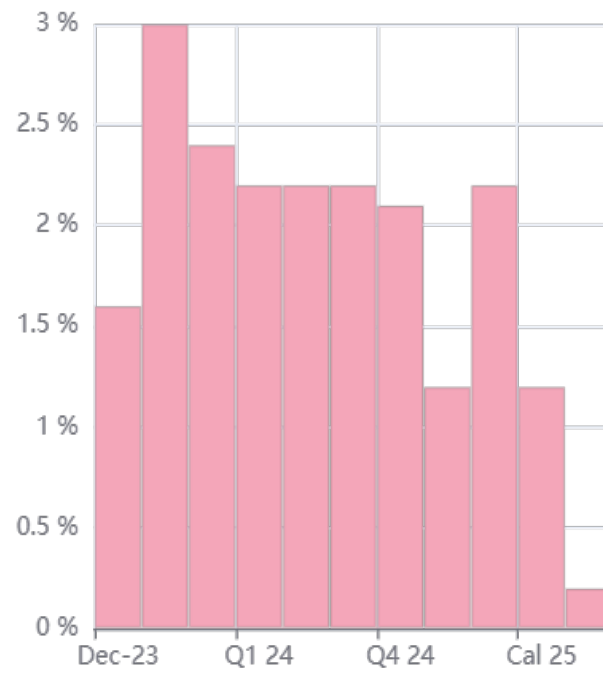
巴拿马型散货船Panamax

| 4TC | \$/day | WoW | |
|--------|-----------|--------|--------|
| Dec-23 | 17,168.00 | -107.0 | -0.6 % |
| Jan-24 | 13,046.00 | -61.0 | -0.5 % |
| Feb-24 | 11,057.00 | 243.0 | 2.2 % |
| Q1 24 | 12,320.00 | 127.33 | 1.0 % |
| Q2 24 | 13,093.00 | 393.0 | 3.1 % |
| Q3 24 | 12,696.00 | 353.0 | 2.9 % |
| Q4 24 | 12,418.00 | 311.0 | 2.6 % |
| Q1 25 | 10,779.00 | 175.0 | 1.7 % |
| Cal 24 | 12,631.75 | 296.08 | 2.4 % |
| Cal 25 | 11,649.75 | 243.0 | 2.1 % |
| Cal 26 | 11,693.00 | 129.0 | 1.1 % |



超大灵便型散货船Supramax

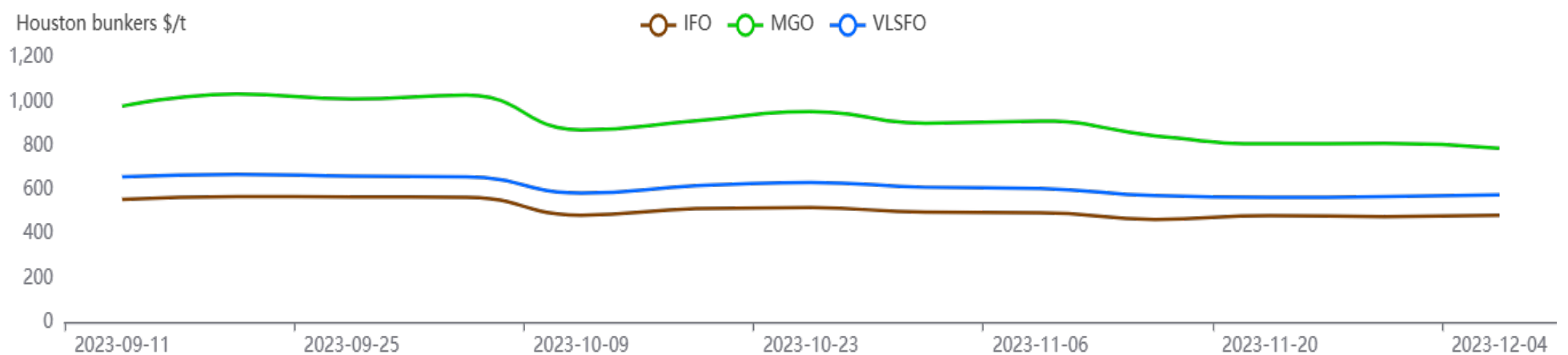
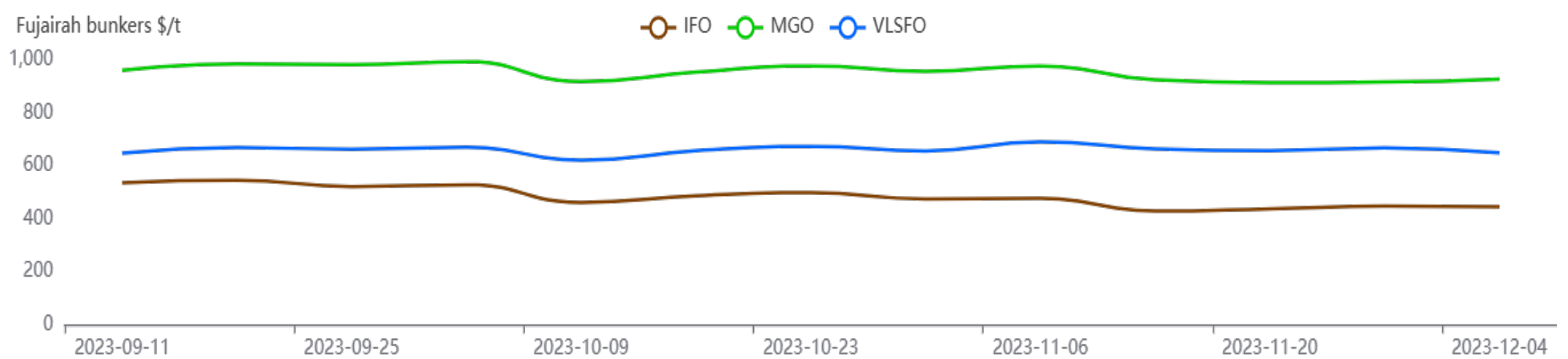
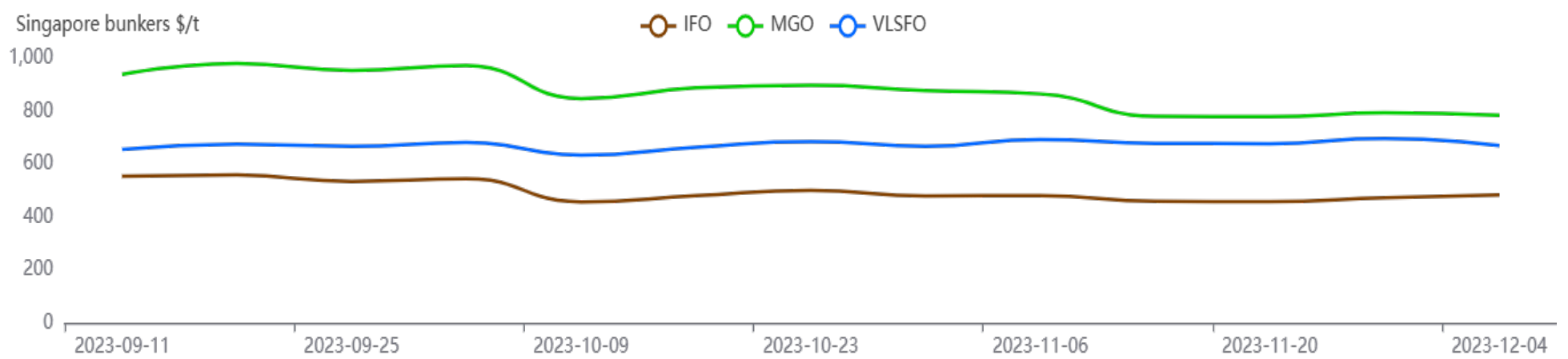
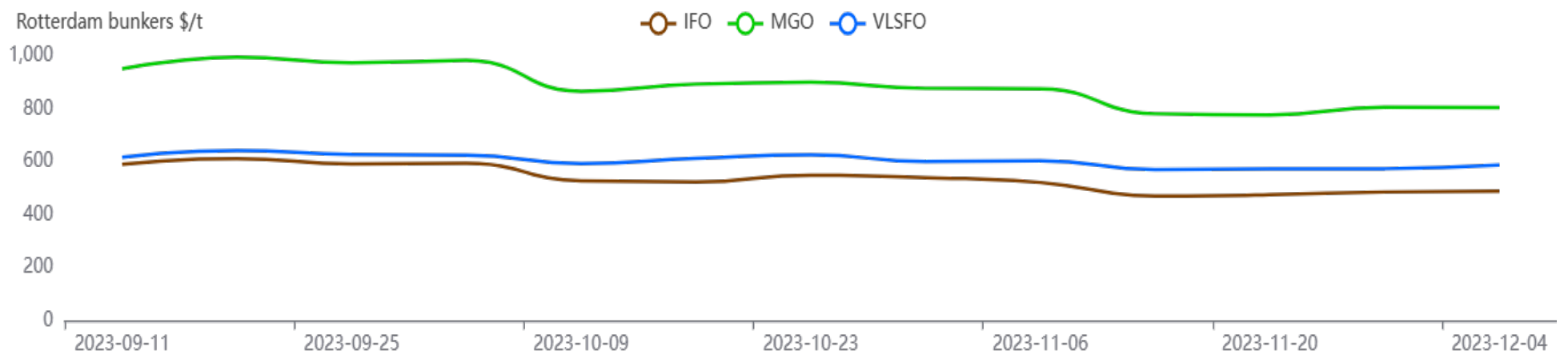
| 10TC | \$/day | WoW | |
|-----------|-----------|--------|-------|
| Dec-23 | 16,267.00 | 259.0 | 1.6 % |
| Jan-24 | 13,313.00 | 388.0 | 3.0 % |
| Feb-24 | 10,613.00 | 246.0 | 2.4 % |
| Q1 24 | 12,168.33 | 262.67 | 2.2 % |
| Q2 24 | 12,529.00 | 271.0 | 2.2 % |
| Q3 24 | 12,371.00 | 271.0 | 2.2 % |
| Q4 24 | 12,071.00 | 246.0 | 2.1 % |
| Q1 25 | 11,446.00 | 138.0 | 1.2 % |
| 12,284.83 | Cal 24 | 262.67 | 2.2 % |
| Cal 25 | 11,446.00 | 138.0 | 1.2 % |
| Cal 26 | 11,542.00 | 25.0 | 0.2 % |



第六部分 燃油价格 BUNKER PRICE

| MP | LO | HO | MO | SP | WoW | W% | M% |
|-----------|-------|-------|-------|-------|-------|--------|--------|
| zhoushan | 682.0 | 490.0 | 845.5 | 192.0 | 3.5 | 1.86 | N/A |
| Singapore | 670.5 | 484.5 | 785.5 | 186.0 | -38.5 | -17.15 | -12.47 |
| Rotterdam | 588.5 | 489.5 | 805.0 | 99.0 | 11.0 | 12.5 | 20.73 |
| Fujairah | 649.0 | 445.0 | 927.5 | 204.0 | -15.5 | -7.06 | -4.23 |
| Houston | 577.0 | 484.5 | 789.5 | 92.5 | 2.0 | 2.21 | -15.53 |

(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 | | 226.72 | 10.86 | 5.03 | 0.36 | -23.83 |
| Maize | | 233.13 | 9.48 | 4.24 | 2.17 | -25.4 |
| Soybeans | | 255.25 | -4.89 | -1.88 | -2.76 | -15.76 |
| Rice | | 253.35 | 6.38 | 2.58 | 4.76 | 37.06 |
| Barley | | 223.41 | 5.92 | 2.72 | -0.1 | -28.11 |
| Energy | | Index | +/- | Weekly | Monthly | YTD |
| Crude Oil | USD/Bbl | 72.98 | -2.08 | -2.77 | -10.55 | -1.41 |
| Brent | USD/Bbl | 77.77 | -2.33 | -2.91 | -9.56 | -4.21 |
| Natural Gas | USD/MMBtu | 2.7 | -0.04 | -1.46 | -20.35 | -59.52 |
| Gasoline | USD/Gal | 2.1 | -0.06 | -2.78 | -5.83 | -8.3 |
| Heating Oil | USD/Gal | 2.64 | -0.17 | -6.05 | -9.9 | -17.76 |
| Ethanol | USD/Gal | 1.8 | -0.08 | -4.26 | -6.25 | -30.77 |
| Naphtha | USD/T | 631.82 | 6.11 | 0.98 | 1.08 | -5.53 |
| Propane | USD/Gal | 0.71 | 0.07 | 10.94 | 10.94 | -17.44 |
| Uranium | USD/Lbs | 81.0 | 0.75 | 0.93 | 9.46 | 60.87 |
| Methanol | CNY/T | 2452.0 | 49.0 | 2.04 | -0.24 | -8.58 |
| TTF Gas | EUR/MWh | 42.02 | -2.96 | -6.58 | -9.09 | -65.68 |
| UK Gas | GBP/thm | 106.12 | -9.33 | -8.08 | -10.41 | -63.21 |
| Industrial | | Index | +/- | Weekly | Monthly | YTD |
| Copper | USD/Lbs | 3.83 | 0.06 | 1.59 | 4.08 | 6.39 |
| Coal | USD/T | 133.5 | 11.5 | 9.43 | 8.98 | -61.79 |
| Steel | CNY/T | 3897.0 | -47.0 | -1.19 | 1.41 | 4.56 |
| Iron Ore | USD/T | 133.0 | -3.0 | -2.21 | 5.98 | 31.03 |
| Aluminum | USD/T | 2200.5 | -31.5 | -1.41 | -2.85 | -6.86 |
| Iron Ore Fe 62% | USD/T | 2200.5 | -31.5 | -1.41 | -2.85 | -6.86 |
| Metals | | Index | +/- | Weekly | Monthly | YTD |
| Gold | USD/t.oz | 2067.6 | 55.2 | 2.74 | 4.12 | 17.63 |
| Silver | USD/t.oz | 25.17 | 0.46 | 1.86 | 8.58 | 17.78 |
| Platium | USD/t.oz | 923.3 | -10.9 | -1.17 | -0.63 | -6.53 |
| Currencies | | Index | +/- | Weekly | Monthly | YTD |
| EUR/USD | | 1.09 | 0.0 | 0.0 | 1.87 | 4.81 |
| USD/CNY | | 7.14 | -0.02 | -0.28 | -1.92 | -0.97 |

第八部分 本周话题 WEEKLY TOPIC



胡塞武装红海咽喉的痛翅

路透迪拜12月6日电:美国海军当天上午击落一架从也门胡塞武装控制地区起飞的无人机。这是自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,美国海军第六次在红海南部海域向无人机开火。UKMTO表示,它已收到来自船长的“大量报告”,称在红海入口处有小型船只进行可疑活动,但没有透露细节。情报公司Diaplous Maritime Services后来表示,一艘船上的武装保安在国际推荐走廊(International Recommended Transit Corridor)发现了一支由10艘“也门型”小艇组成的舰队。局势没有升级,这艘船得以继续航行。

目前人们还不清楚,Zodiac Maritime所属的2万载重吨“Central Park”(2015建造),于上个月11月26日被劫持未遂事件是否与胡塞武装分子有关。近年来索马里海盗实际上已被根除,有关安全部门的消息人士称,在试图登上“Central Park”后,这些投降的袭击者逃向了也门,而不是索马里。

此前,11月19号胡塞武装在红海劫持了汽车运输公司(Ray Car Carriers)的“Galaxy Leader”,(2022年建造),并于11月24号对东太平洋航运(Eastern Pacific Shipping)旗下的CMA CGM Symi(2002年建造)进行了无人机袭击。袭击发生后,AP Moller-Maersk将两艘与以色列有关的集装箱船,4256 teu的Lisa(2009年建造)和5295 teu的Maersk Pangani(2021年建造)转出到该地区的运营。以色列集装箱船运营商Zim和Ray汽车运输公司也在转移船只。这一混乱加剧了该地区的紧张局势。

船上武装警卫已被警告不要与试图在也门海域劫持船只的胡塞武装交战。海事安全公司非洲风险合规(ARC)表示,任何保护船只的企图都可能产生严重后果。ARC补充说:“由于这种威胁涉及更广泛的地缘政治冲突,而不是海盗,因此即使一艘船搭载了武装保安,在胡塞武装发动袭击的情况下也无能为力。这一系列袭击首先导致了红海与以色列有联系的船只的战争险保险费飙升,也整体提高了该地区船只的保险费,并威胁到占世界贸易12%的航道上的贸易。近几个月来,贸易商一直在提高警惕,担心会爆发更广泛的冲突。虽然这些担忧有所缓解,但一些事件提醒人们,这个重要的贸易地区存在动荡。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。一些战争险保险公司正在对红海已经列出的高风险地区征收更高的额外保费。胡塞武装最新发布声明称,将扩大针对以色列的海上打击范围。警告除了将打击那些由以色列公司经营和/或经营的船舶外,还将禁止任何前往以色列的船只在红海和阿拉伯海航行,这一禁令将适用于任何国籍的船只。

HiFleet航运大数据分析显示,任何途经红海的航运中断对粮食贸易的影响都会超过其他任何干货。2022年约有3.33亿吨干货通过苏伊士运河,相当于海运干货贸易的近6.5%。今年流经苏伊士运河的干散货贸易量将超过这一水平,截至11月底,总量已经接近3.2亿吨。美国白宫周一表示,美国可能会建立一支海军特遣部队,为红海的商船护航。

Dubai, Dec 6 (Reuters) - The U.S. Navy shot down a drone that took off from an area controlled by the Houthis in Yemen this morning. It was the sixth time the U.S. Navy has fired on a drone in the southern Red Sea since the Oct. 7 war between Israel and the Palestinian militant group Hamas. UKMTO said it had received "numerous reports" from ship captains of suspicious activity by small vessels at the entrance to the Red Sea, but gave no details. Diaplous Maritime Services, an intelligence firm, later said armed guards on board a ship had spotted a flotilla of 10 Yemeni-type dinghy vessels in the International Recommended Transit Corridor. The situation did not escalate and the ship was able to continue its voyage.

It is not clear whether the attempted hijacking of the 20,000-DWT Central Park (built in 2015), which Zodiac Maritime owns, on November 26 last month, is related to the activities of Houthi militants. Somali piracy has been virtually eradicated in recent years. Security sources said that after attempting to board Central Park, the surrendered attackers fled towards Yemen, not Somalia.

On November 19, the Houthis hijacked Ray Car Carriers' Galaxy Leader (built in 2022) in the Red Sea. On November 24, a drone attack was carried out on CMA CGM Symi (built in 2002), owned by Eastern Pacific Shipping. Following the attack, AP Moller-Maersk transferred two Israeli-linked container ships, the 4,256-TEU Lisa (built in 2009) and the 5,295-TEU Maersk Pangani (built in 2021), out of operation in the area. Israeli container ship operators Zim and Ray Motor Transport are also moving ships. The confusion has risen in the region.

The armed guards on board have been warned not to engage the Houthis who are trying to hijack the ship in Yemeni waters. African Risk Compliance (ARC), a maritime security firm, said any attempt to protect ships could have serious consequences. ARC added: "As this threat relates to a broader geopolitical conflict rather than piracy, even if a ship were to carry armed security guards, there would be little to do in the event of an attack by the Houthis."

The attacks have led to a spike in war risk insurance rates for ships linked to Israel in the Red Sea, raising premiums for ships in the region as a whole and threatening trade in a waterway that accounts for 12 percent of world trade. Commodity traders have been on alert in recent months, fearing a wider conflict. While those fears have eased, some events have served as a reminder of the turmoil in this important trading region. From oil to wheat to television sets, the Red Sea and Egypt's Suez Canal move billions of dollars of goods every day. Some war risk insurers are charging higher additional premiums for areas already listed as high-risk by the Red Sea. The Houthis freshly issued a statement saying that they would expand the range of naval strikes against Israel. In addition to cracking down on those ships operated and/or operated by Israeli companies, the warning will also prohibit any ships bound for Israel from sailing in the Red Sea and the Arabian Sea, a ban that will apply to ships of any nationality.

HiFleet Shipping Big data analysis shows that any disruption to shipping via the Red Sea would have a greater impact on food trade than any other dry goods. About 333 million tonnes of dry cargo passed through the Suez Canal in 2022, equivalent to nearly 6.5% of the seaborne dry bulk trade. Dry bulk trade through the Suez Canal is set to exceed that level this year, with the total already approaching 320 million tonnes at the end of November. The White House said last Monday that the U.S. may establish a naval task force to escort commercial ships in the Red Sea.