



2023年 第53周市场周报

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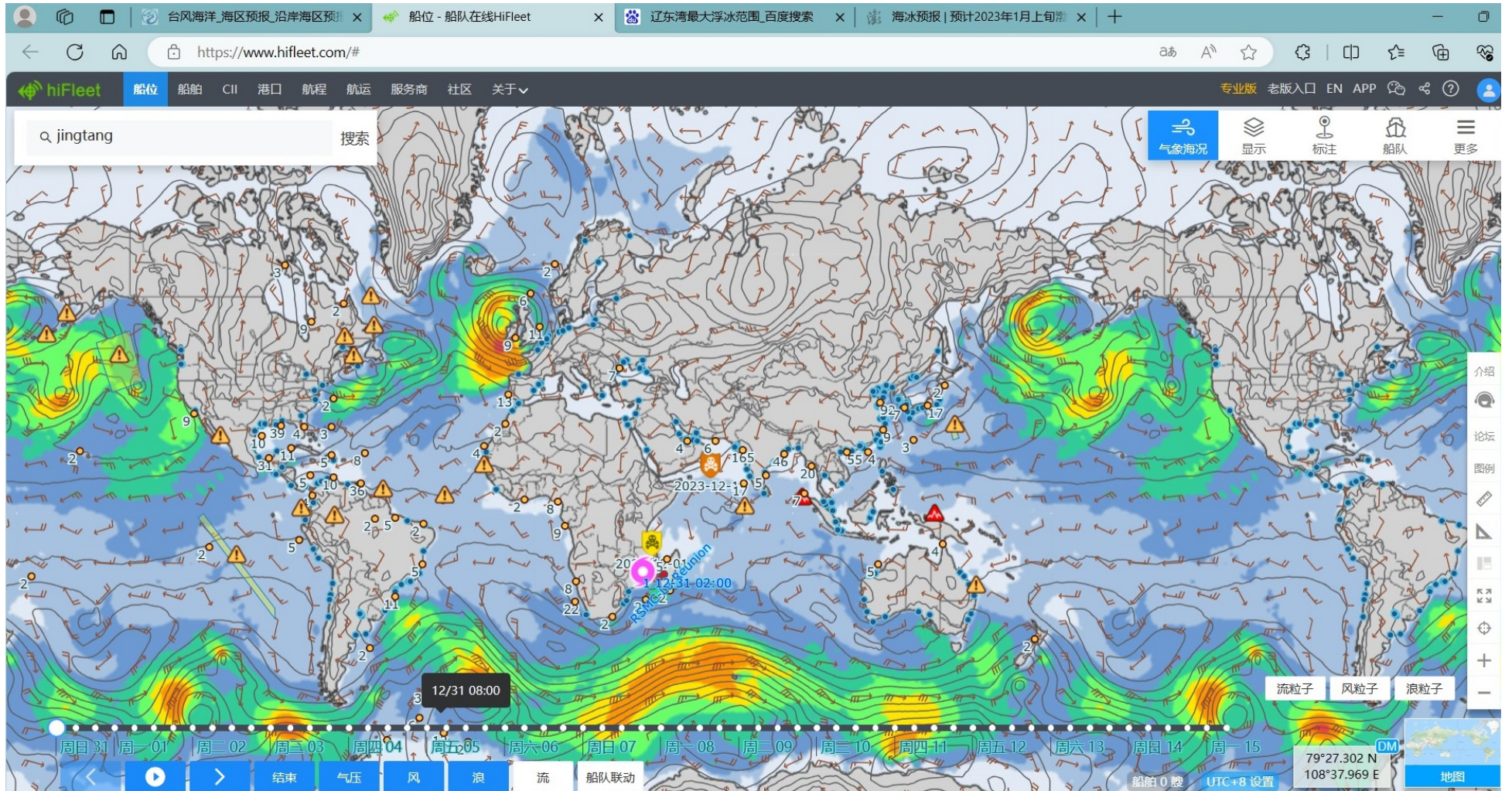
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本周话题 WEEKLY TOPIC

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856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 856 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.

航海气象 Meteorology

未来一周中国渤海、黄海、东海海域风力由5-6级逐步减弱到4-5级，相关海域海浪将从2米的中浪到1米轻浪；台湾海峡风力由6-7级降低到4-5级，台湾海峡洋面海浪可能经历3米大浪；南海大部海域风力维持在5-6级，海浪有时出现3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海里左右，莱州湾最大浮冰范围5海里左右；黄海北部最大浮冰范围5-15海里。大西洋和太平洋北部区域低压活动频繁，相关海域海况恶劣。The coming week the wind in Bohai Sea, Yellow Sea and China East Sea will gradually weaken from strong breeze to moderate with the seas from moderate to slight. The wind in the Taiwan Strait will also ease from near gale to breeze. The sea in the Taiwan Strait happens to experience rough. In most of the South China Sea the wind stay strong breeze and sometimes see rough seas. Low-pressure in the north of North Atlantic Ocean and Pacific is frequent, leading to deteriorating sea conditions.

海盗事件 Piracy

最近一周没有新的海盗报道。There are not new piracy reports in the week.

海上事件 Marine Incidents

12月28日消息，在黑海一艘散货船在多瑙河上的一个港口装载谷物时撞上了水雷，造成两名海员受伤。据乌克兰南部军队的电报报道，爆炸导致这艘身份不明的巴拿马国旗船只的上层甲板起火。The information reported on 28th Dec, two seafarers were injured when a bulk carrier hit a mine in the Black Sea as it headed to load grain at a port on the Danube river. The explosion started a fire on the upper deck of the unidentified Panama-flagged ship according to the Telegram account of Ukraine's southern military forces.

其它 Others

无 Nil

备注 Remark

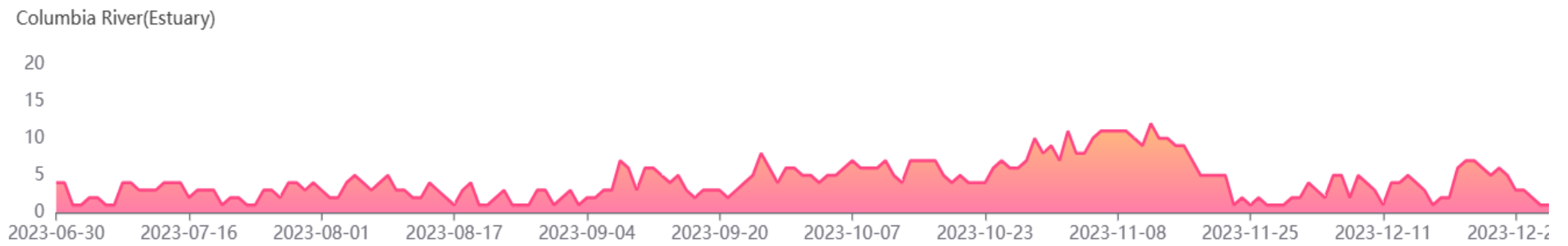
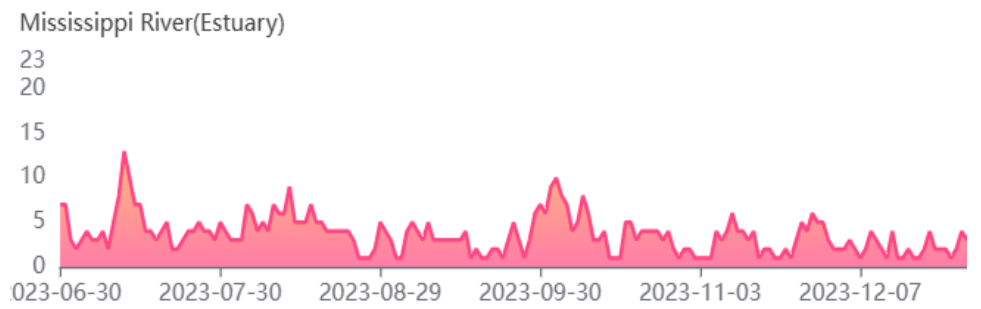
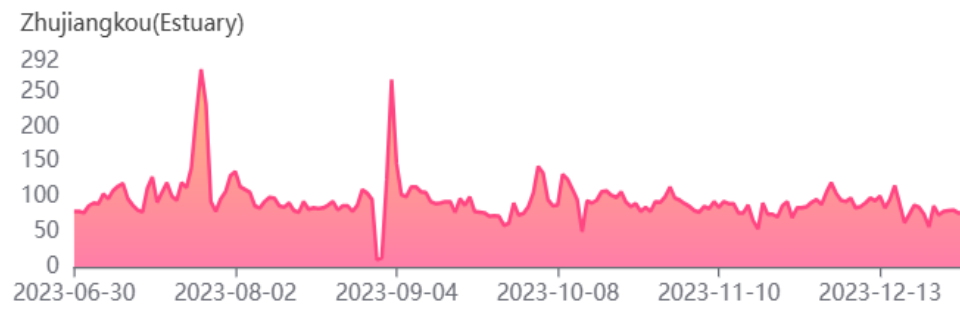
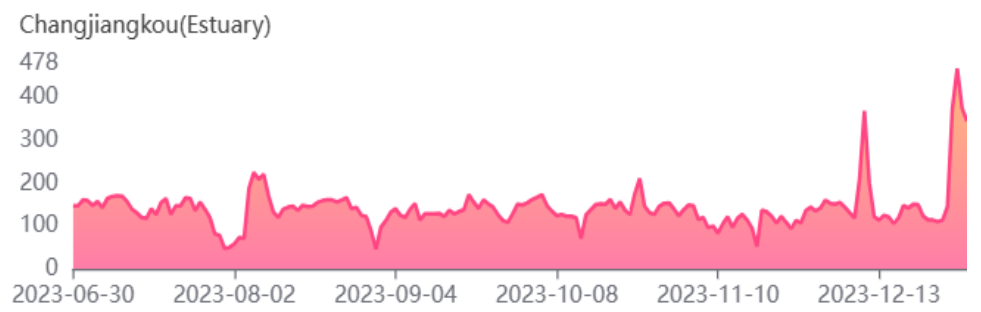
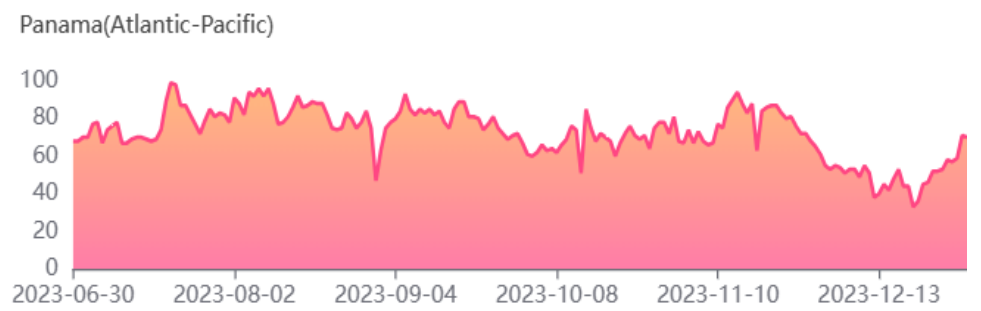
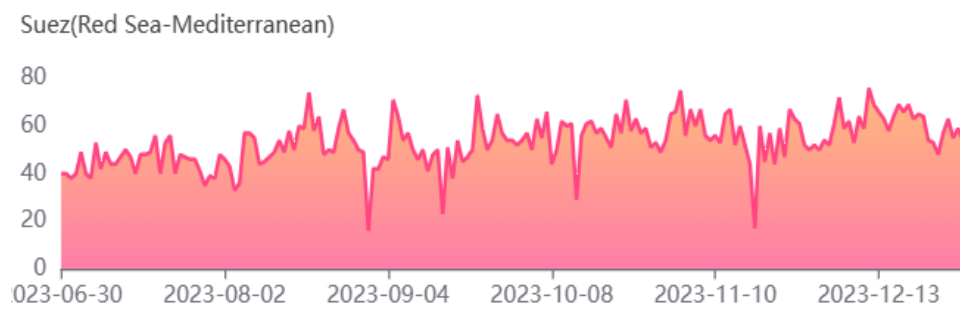
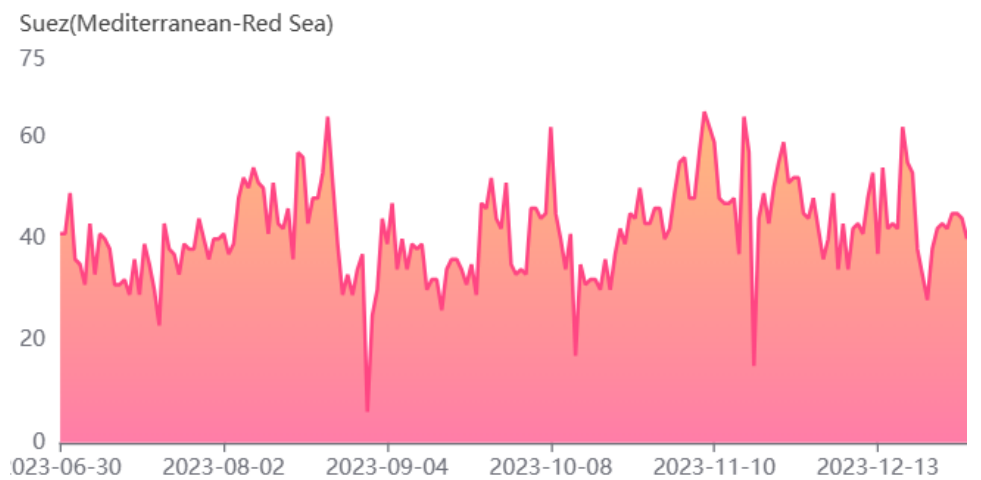
本报告数据截止时间为2023年12月31日北京时间17点；所有数据和或观点仅供参考，在任何情况下本公司及其员工不承担任何风险。The data deadline for this report is Beijing time 17 hours on December 31 of 2023; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

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	51	1768	-63	185
Miss.Riv.	3	54	-4	-24
CJK	345	5212	982	1806
Pa.Atlan.	70	1460	119	-735
Colum.Riv.	1	107	-10	-63
Suez.Med.	40	1253	-10	-159
Pa.Pac.	64	1879	28	-554
ZJK	78	2527	13	68

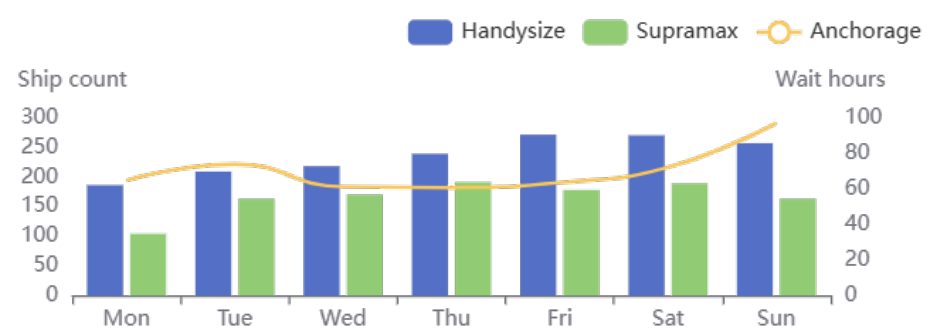


(P.N.-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

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

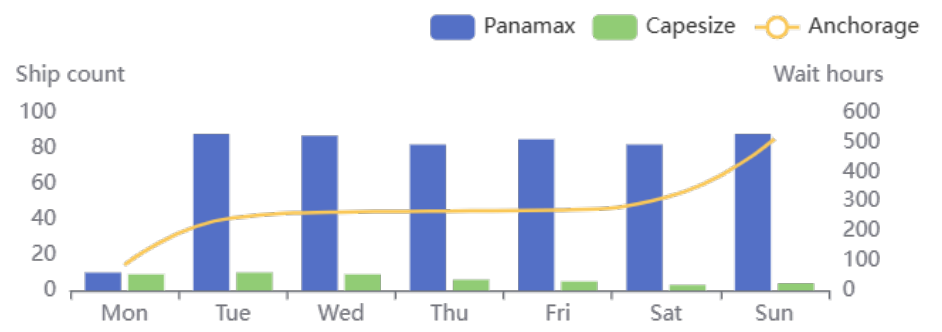
Type	M	T	W	Th	F	Sat	Sun
HDY	186	209	218	239	271	270	257
SMX	104	163	170	191	178	189	163
WT.h.	64.7	73.9	61.1	60.7	63.5	72.1	97



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

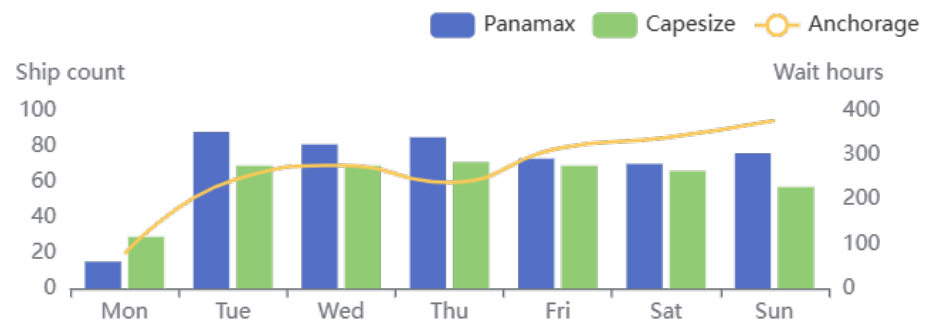
Type	M	T	W	Th	F	Sat	Sun
Pan.	10	88	87	82	85	82	88
Cap	9	10	9	6	5	3	4
WT.h.	86.5	244.9	264.2	267.8	271.3	314.1	511



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

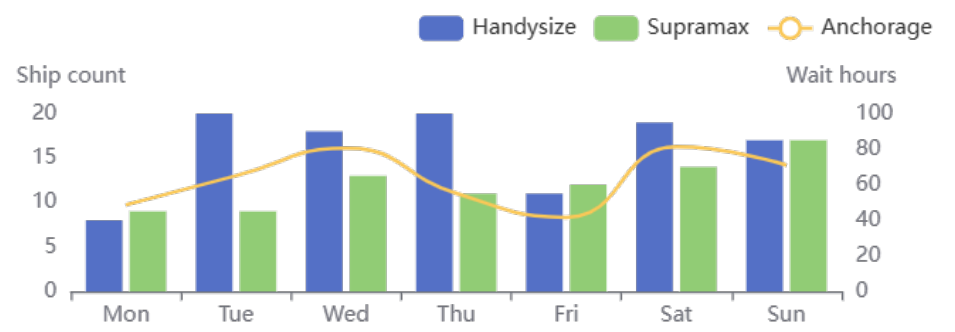
Type	M	T	W	Th	F	Sat	Sun
Pan.	15	88	81	85	73	70	76
Cap	29	69	69	71	69	66	57
WT.h.	77.5	243.1	276.8	238.7	315.1	339.1	378



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

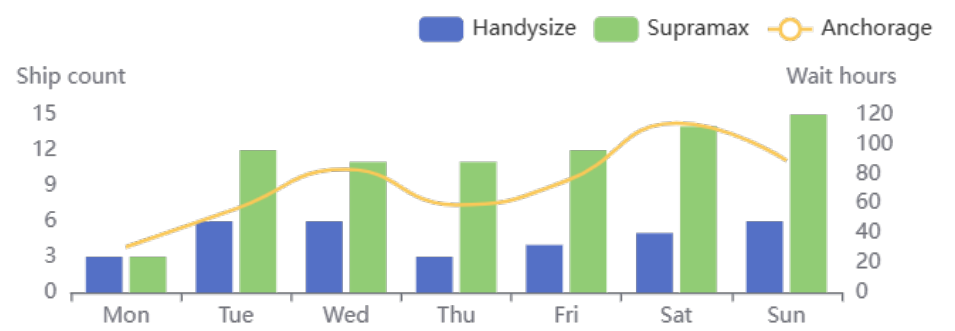
Type	M	T	W	Th	F	Sat	Sun
HDY	8	20	18	20	11	19	17
SMX	9	9	13	11	12	14	17
WT.h.	48.7	65.1	80.7	55.2	41.7	81.5	71



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

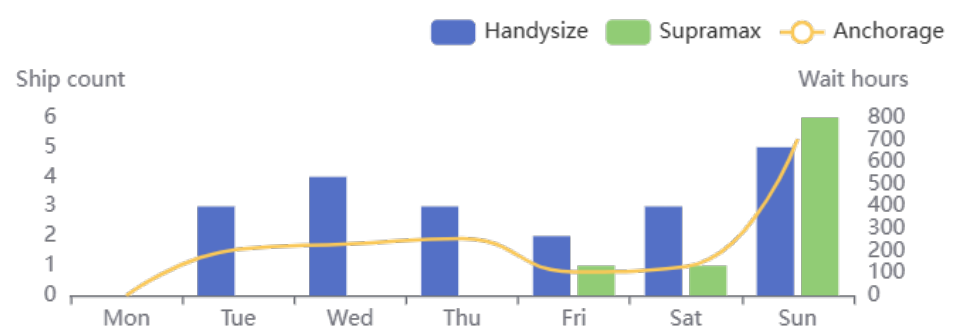
Type	M	T	W	Th	F	Sat	Sun
HDY	3	6	6	3	4	5	6
SMX	3	12	11	11	12	14	15
WT.h.	30.7	56.55	83.1	59.15	75.4	114.2	89



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

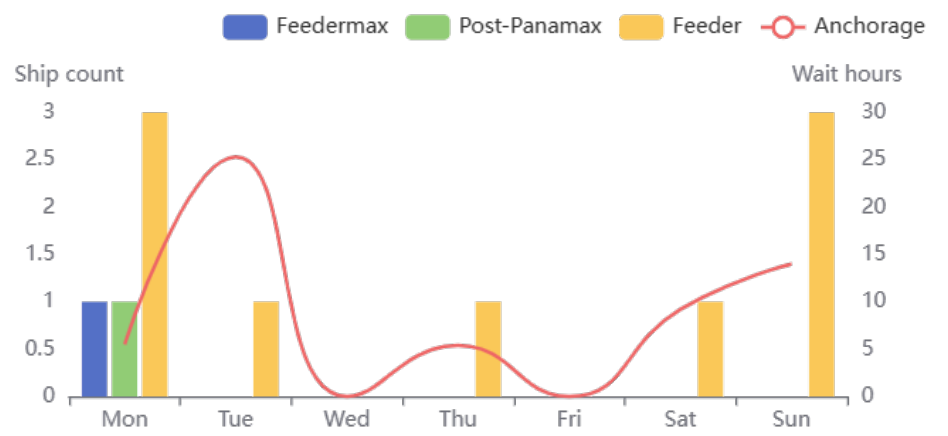
Type	M	T	W	Th	F	Sat	Sun
HDY	0	3	4	3	2	3	5
SMX	0	0	0	0	1	1	6
WT.h.	0.0	207.4	231.4	255.4	105.9	129.9	703



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

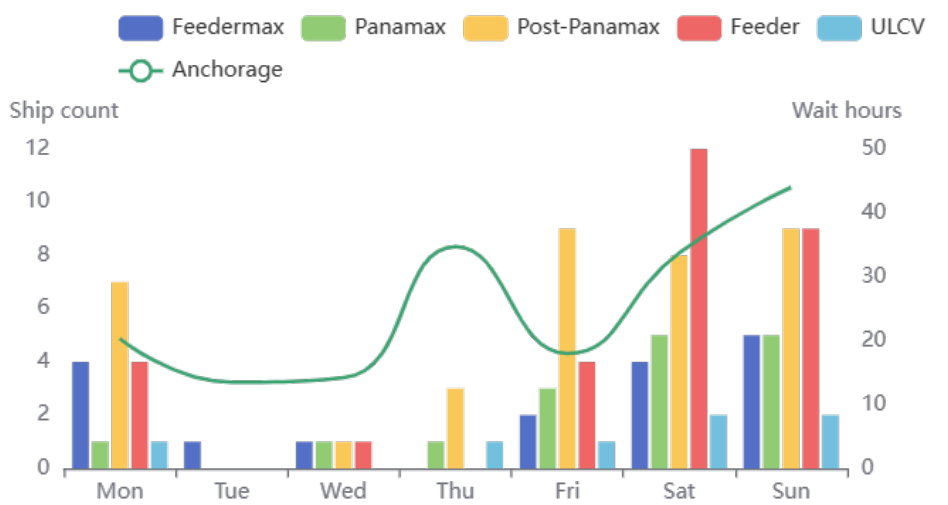
Type	M	T	W	Th	F	Sat	Sun
F.ma.	1	0	0	0	0	0	0
Pan.	0	0	0	0	0	0	0
PPx	1	0	0	0	0	0	0
NPx	0	0	0	0	0	0	0
Fd	3	1	0	1	0	1	3
WT.h.	5.5	25.3	0.0	5.4	0.0	9.2	14
UlcV	0	0	0	0	0	0	0



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

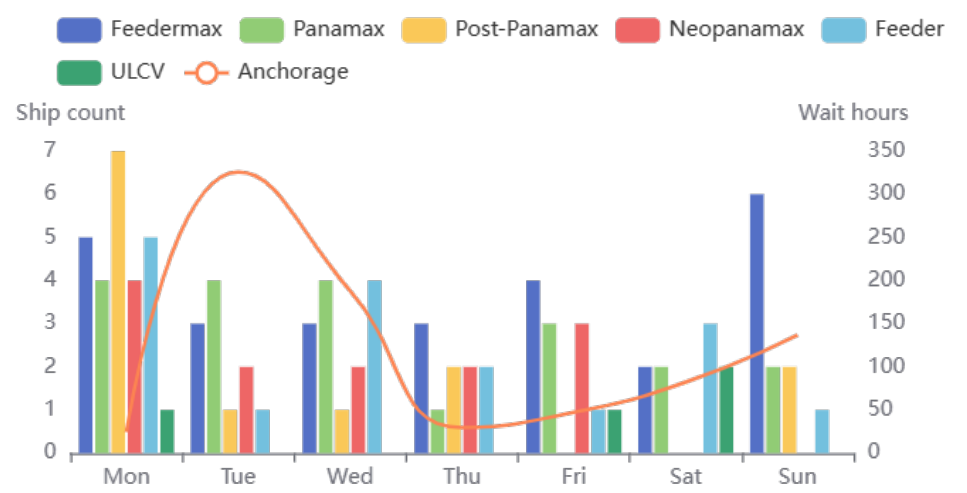
Type	M	T	W	Th	F	Sat	Sun
F.ma.	4	1	1	0	2	4	5
Pan.	1	0	1	1	3	5	5
PPx	7	0	1	3	9	8	9
NPx	0	0	0	0	0	0	0
Fd	4	0	1	0	4	12	9
UlcV	1	0	0	1	1	2	2
WT.h.	20.3	13.5	14.2	34.7	18	33.7	44



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	3	3	4	2	6
Pan.	4	4	4	1	3	2	2
PPx	7	1	1	2	0	0	2
NPx	4	2	2	2	3	0	0
Fd	5	1	4	2	1	3	1
UlcV	1	0	0	0	1	2	0
WT.h.	24.8	325.9	188.2	29.55	47.3	82.3	137



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

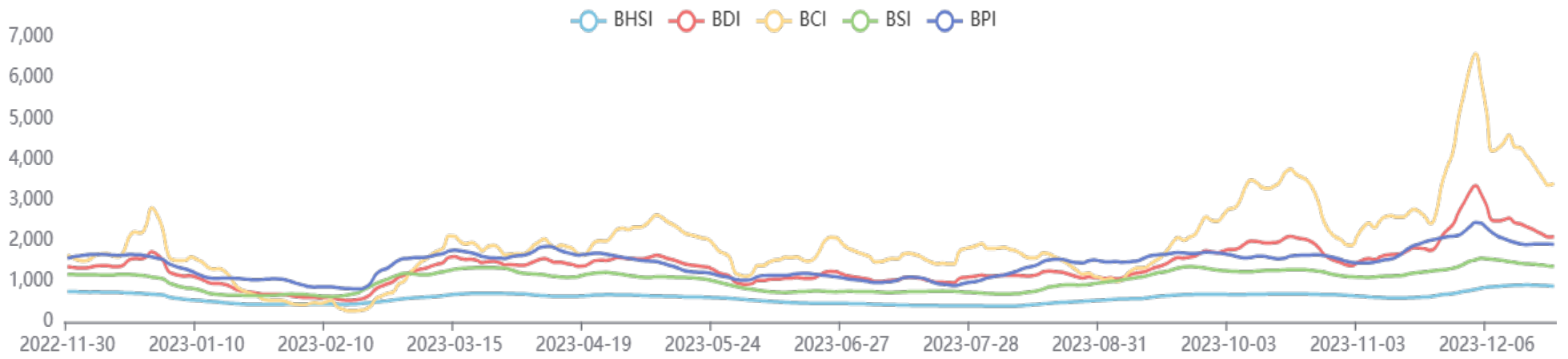
Type	M	T	W	Th	F	Sat	Sun
BDI							
VLSF							
A.SP	12.06	12.11	12.11	12.18	12.19	12.18	



第三部分 航运市场 SHIPPING MARKET

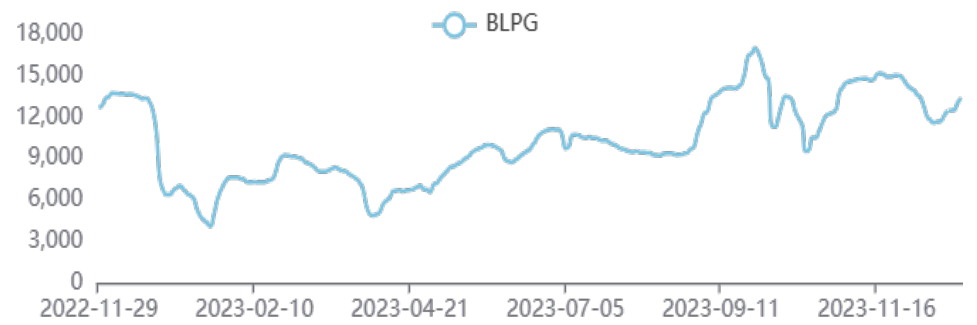
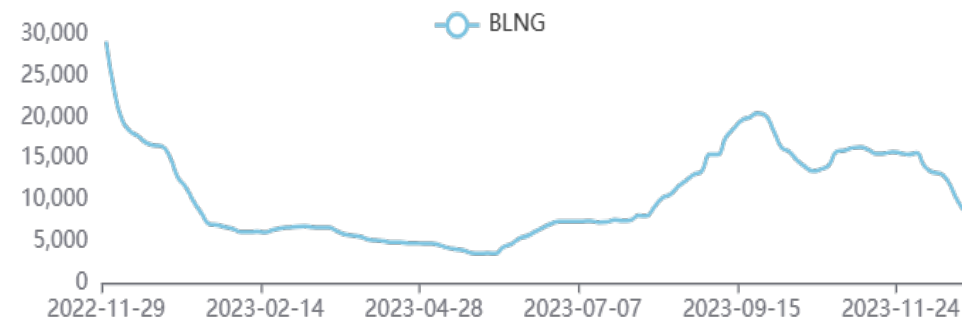
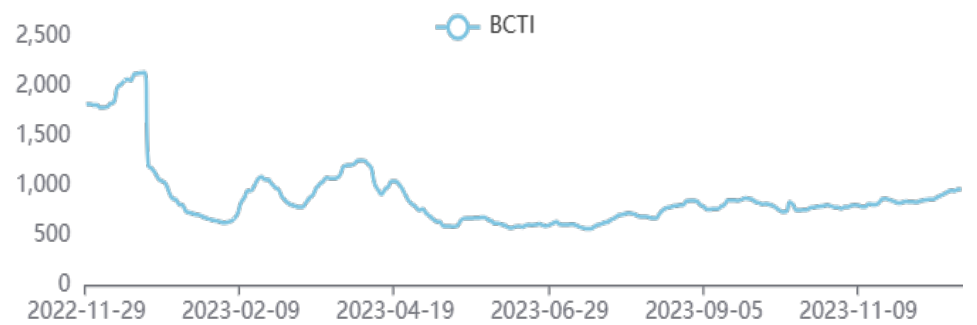
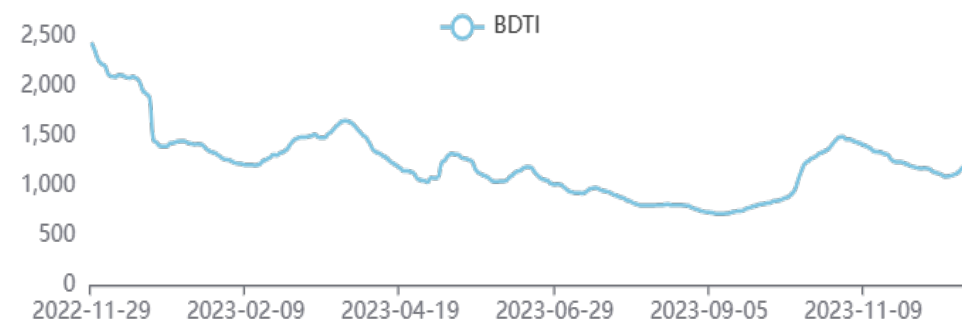
波罗的海干散货指数Baltic Dry Index

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

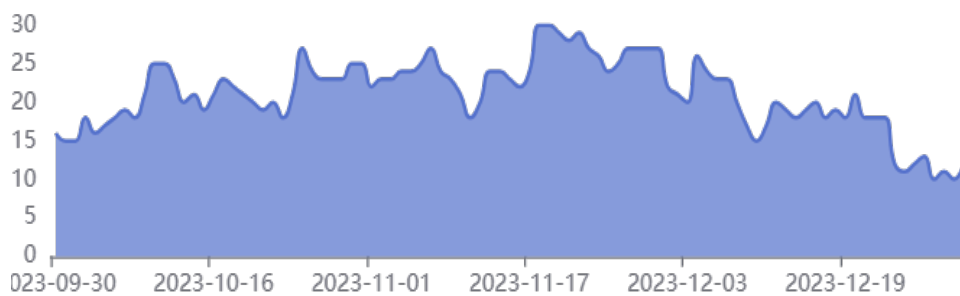


好望角型散货船 Capesize

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.

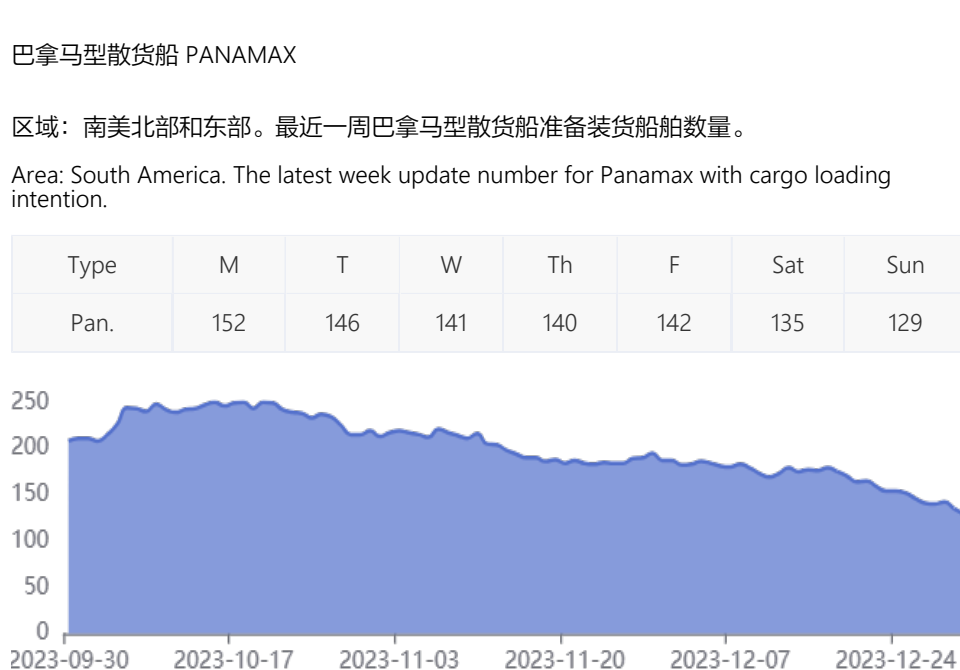
Type	M	T	W	Th	F	Sat	Sun
Cape	11	12	13	10	11	10	12



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	20	23	22	20	25	22	19

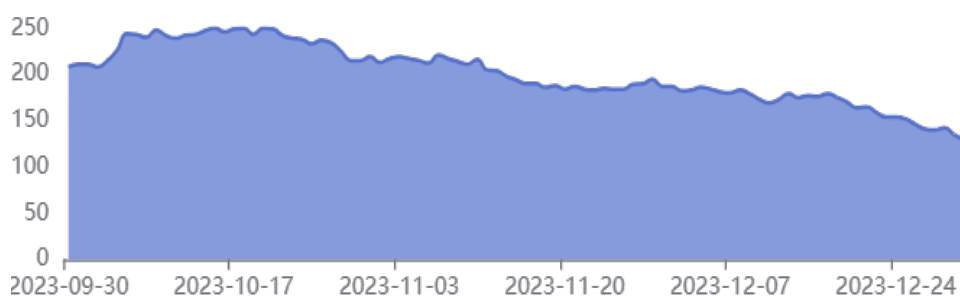


巴拿马型散货船 PANAMAX

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.

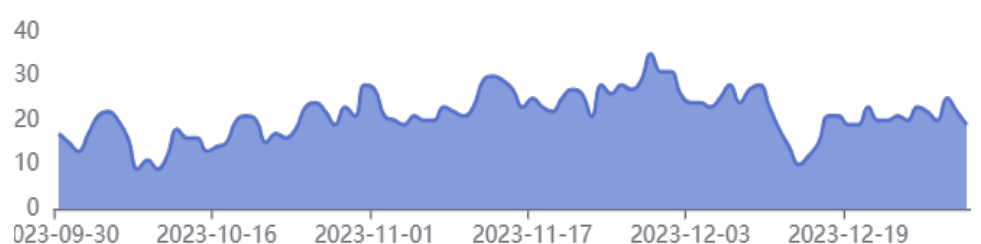
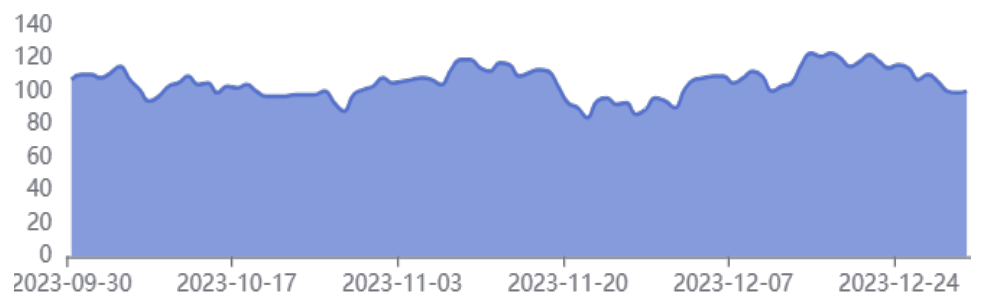
Type	M	T	W	Th	F	Sat	Sun
Pan.	152	146	141	140	142	135	129



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.

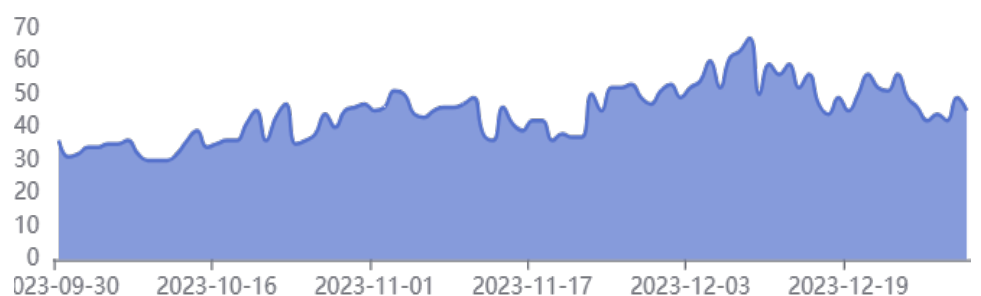
Type	M	T	W	Th	F	Sat	Sun
Cape	114	107	110	106	100	99	100



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.

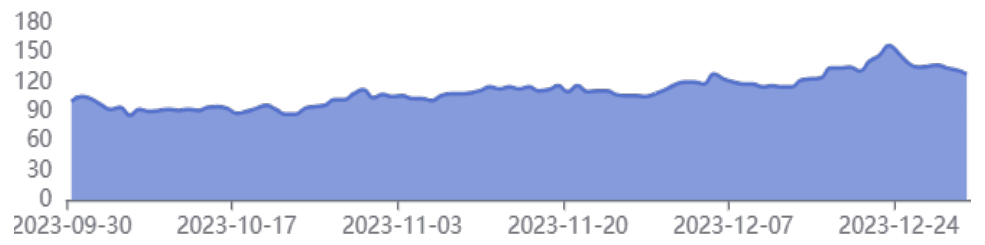
Type	M	T	W	Th	F	Sat	Sun
Pan.	46	45	43	39	46	43	41



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.	139	135	136	137	134	132	128

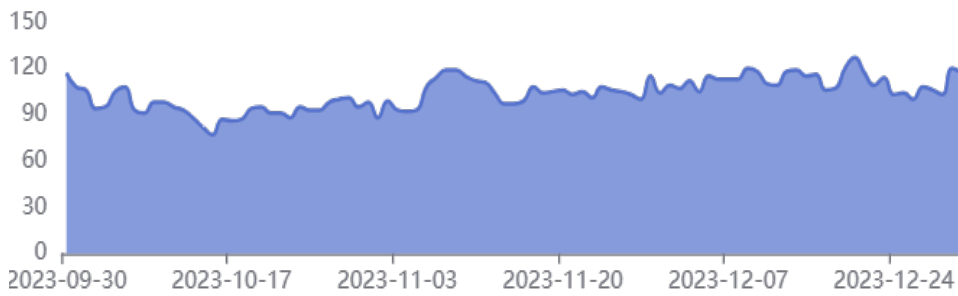


超大灵便型散货 SUPRAMAX

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.

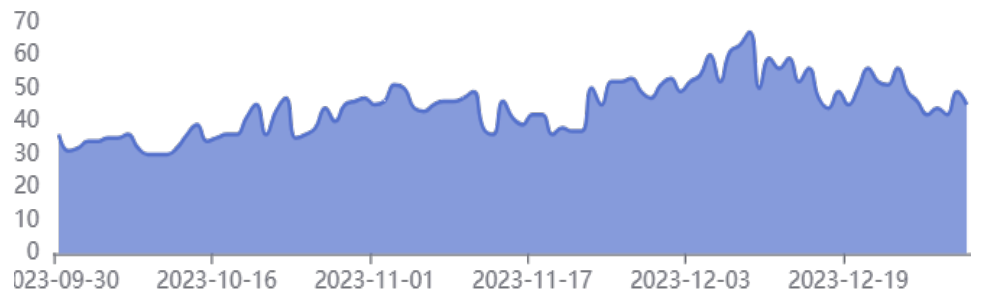
Type	M	T	W	Th	F	Sat	Sun
SMX	104	100	108	106	103	120	117



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.

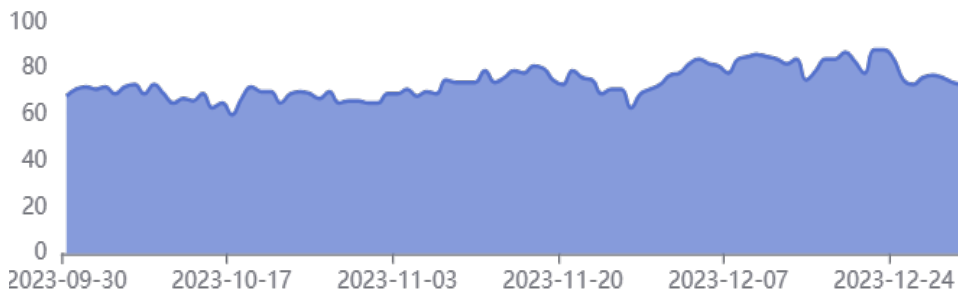
Type	M	T	W	Th	F	Sat	Sun
SMX	49	46	42	44	42	49	45



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.

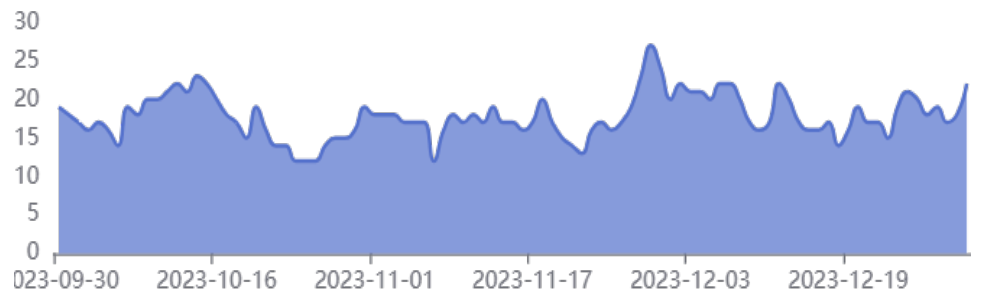
Type	M	T	W	Th	F	Sat	Sun
SMX	21	20	18	19	17	18	22



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.

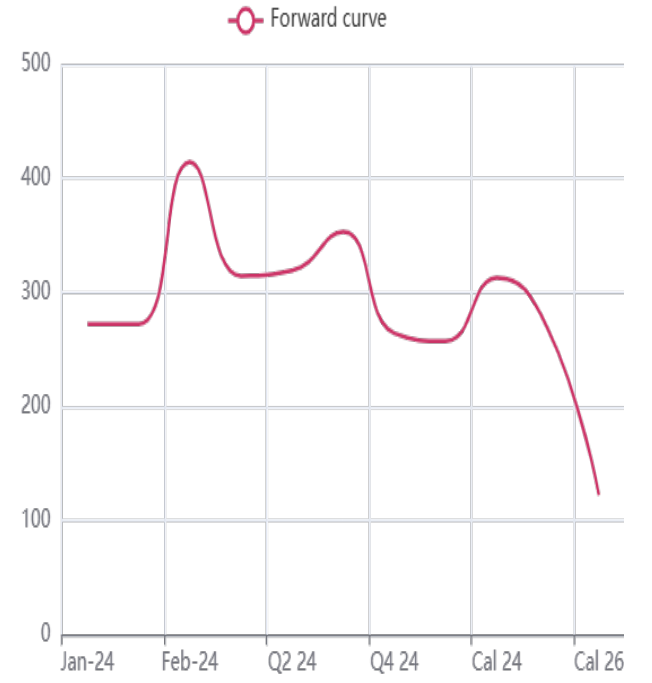
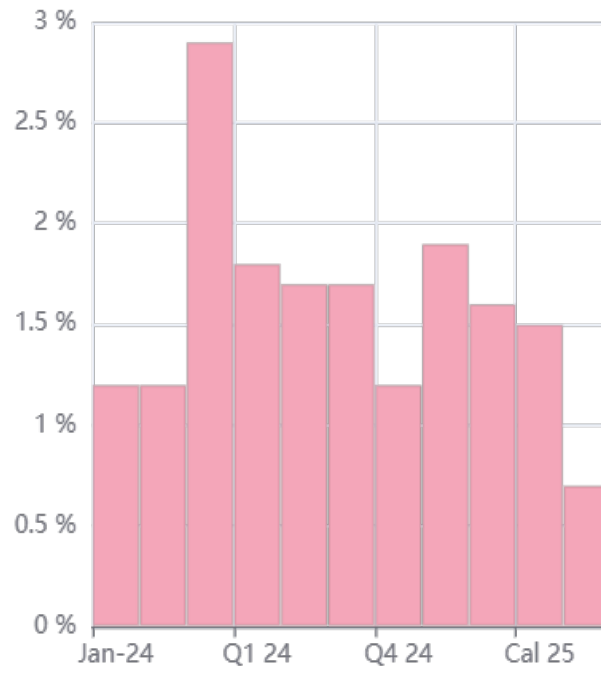
Type	M	T	W	Th	F	Sat	Sun
SMX	75	73	76	77	76	74	73



第五部分 远期运价协议 FFA

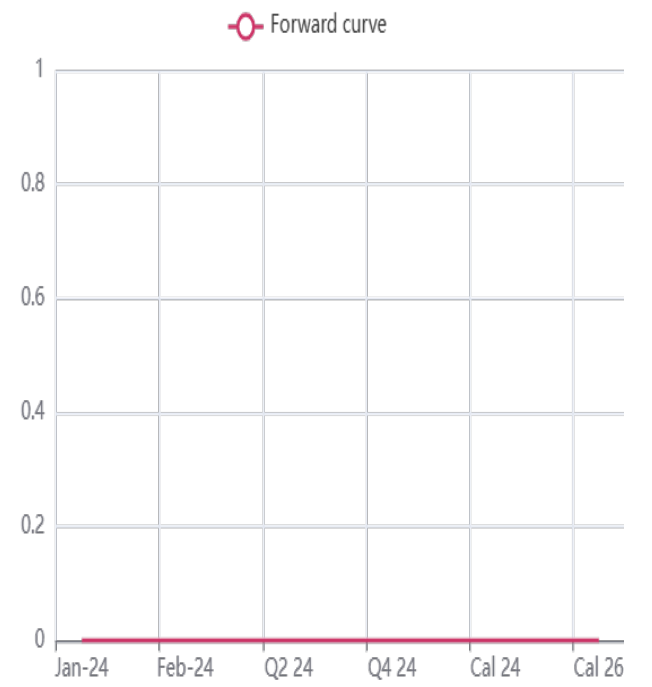
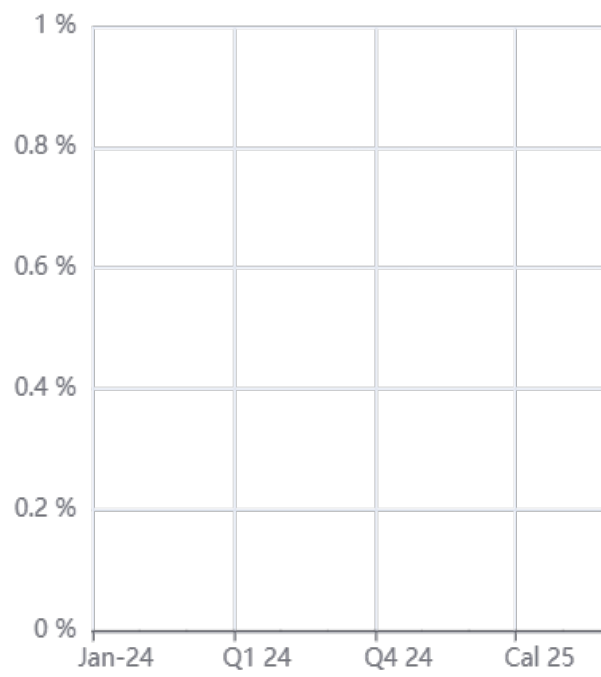
好望角型散货船Capesize

5TC	\$/day	WoW	
Jan-24	23,793.00	272.0	1.2 %
Jan-24	23,793.00	272.0	1.2 %
Feb-24	14,771.00	414.0	2.9 %
Q1 24	18,111.67	314.33	1.8 %
Q2 24	19,631.00	319.0	1.7 %
Q3 24	21,614.00	353.0	1.7 %
Q4 24	21,571.00	264.0	1.2 %
Q1 25	13,607.00	257.0	1.9 %
Cal 24	20,231.92	312.58	1.6 %
Cal 25	18,007.00	268.0	1.5 %
Cal 26	17,586.00	122.0	0.7 %



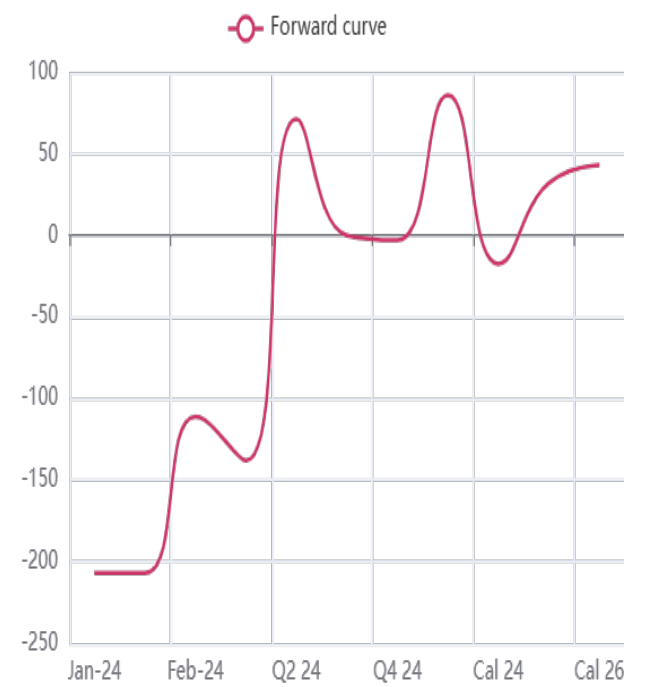
灵便型散货船Handysize

7TC	\$/day	WoW	
Jan-24	13,963.00	0.0	0.0 %
Jan-24	13,963.00	0.0	0.0 %
Feb-24	12,313.00	0.0	0.0 %
Q1 24	13,171.33	0.0	0.0 %
Q2 24	13,333.67	0.0	0.0 %
Q3 24	12,575.00	0.0	0.0 %
Q4 24	12,100.00	0.0	0.0 %
Q1 25	11,388.00	0.0	0.0 %
Cal 24	12,795.00	0.0	0.0 %
Cal 25	11,949.75	0.0	0.0 %
Cal 26	11,500.00	0.0	0.0 %



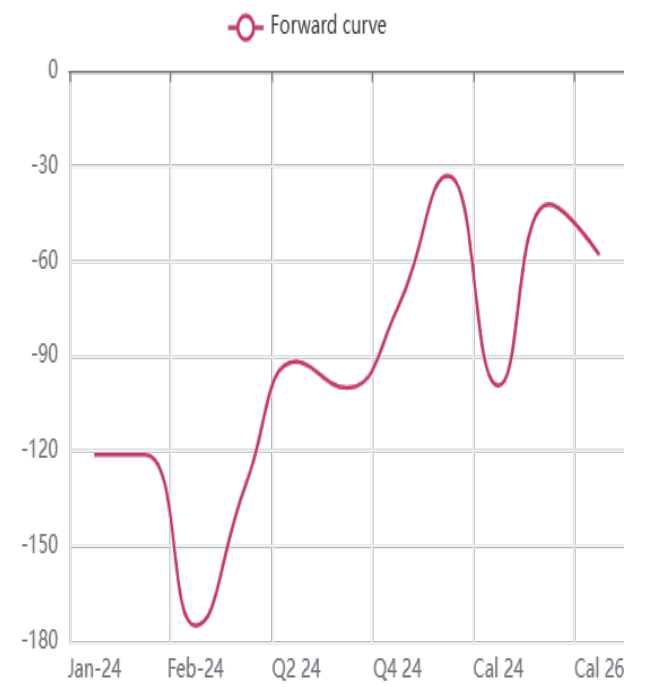
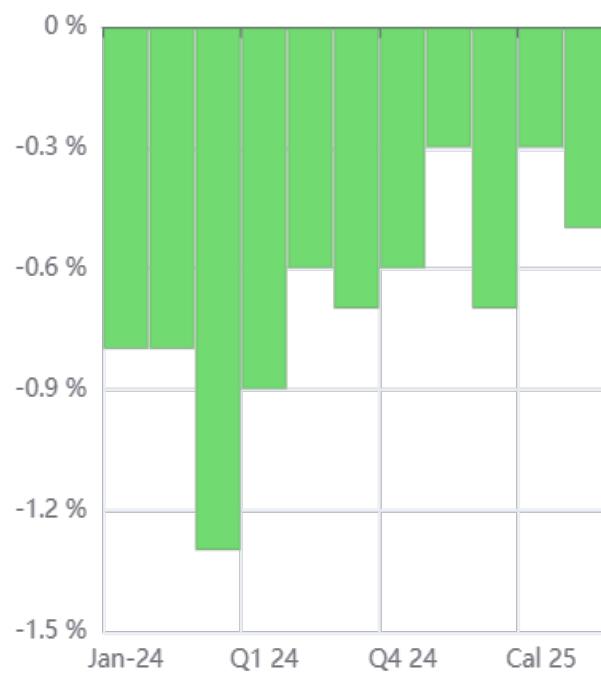
巴拿马型散货船Panamax

4TC	\$/day	WoW	
Jan-24	15,736.00	-207.0	-1.3 %
Jan-24	15,736.00	-207.0	-1.3 %
Feb-24	14,757.00	-111.0	-0.7 %
Q1 24	15,372.67	-138.0	-0.9 %
Q2 24	15,681.00	71.33	0.5 %
Q3 24	14,479.00	0.0	0.0 %
Q4 24	13,618.00	-3.0	0.0 %
Q1 25	12,150.00	86.0	0.7 %
Cal 24	14,787.67	-17.42	-0.1 %
Cal 25	12,736.00	32.0	0.3 %
Cal 26	12,193.00	43.0	0.4 %



超大灵便型散货船Supramax

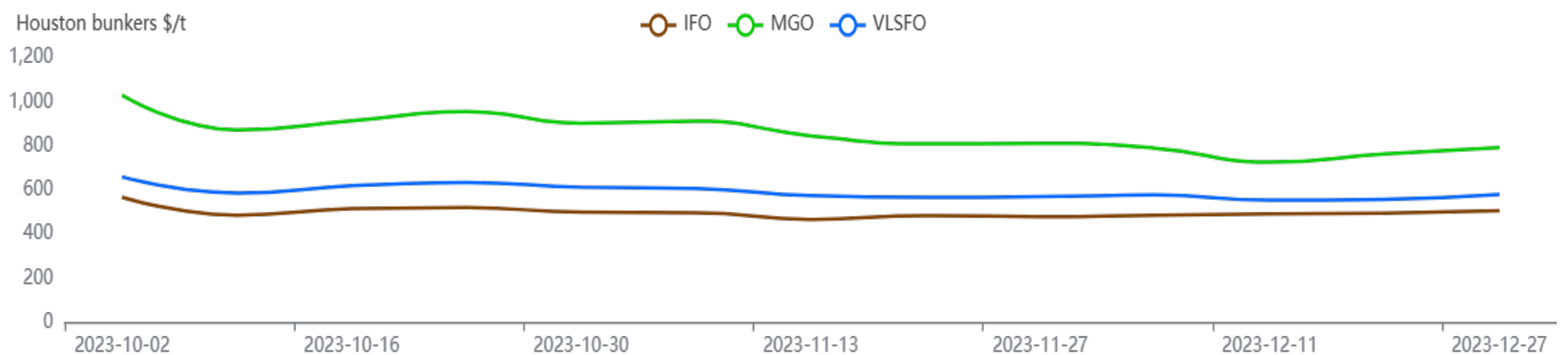
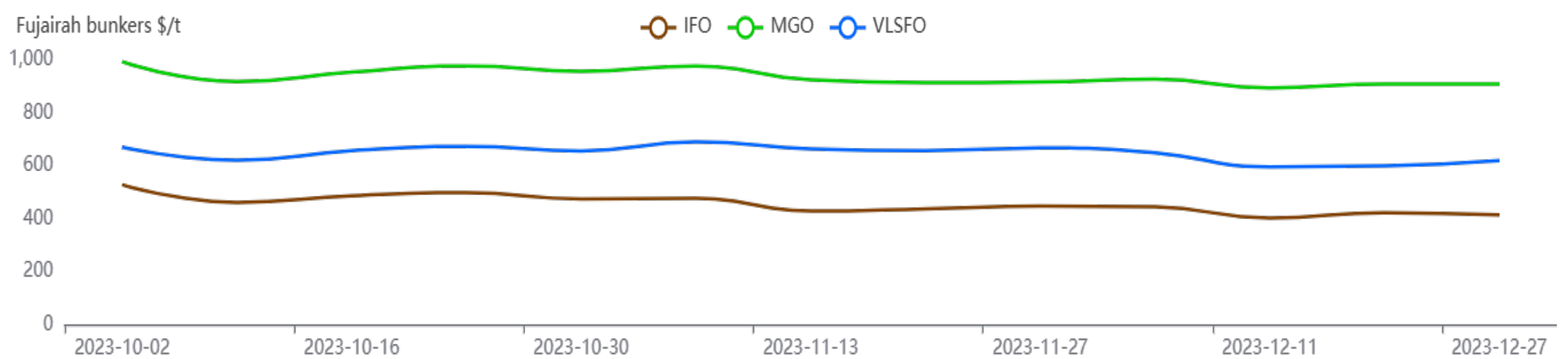
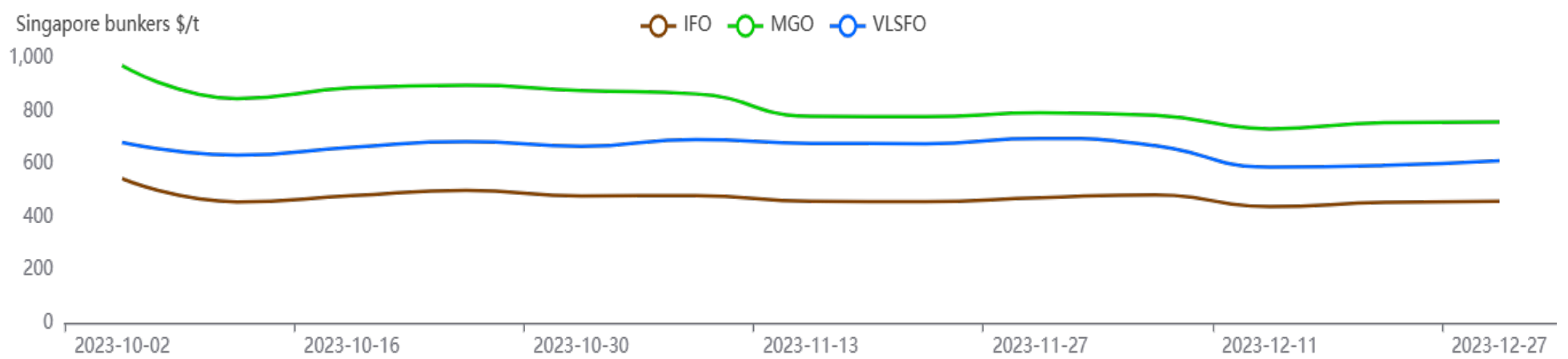
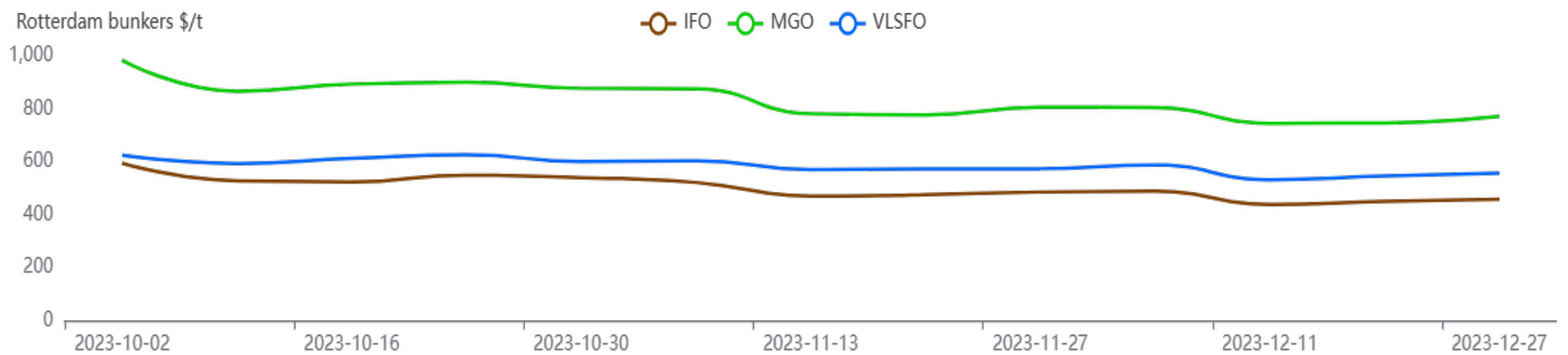
10TC	\$/day	WoW	
Jan-24	14,542.00	-121.0	-0.8 %
Jan-24	14,542.00	-121.0	-0.8 %
Feb-24	13,783.00	-175.0	-1.3 %
Q1 24	14,337.67	-130.33	-0.9 %
Q2 24	14,555.67	-91.67	-0.6 %
Q3 24	13,675.00	-100.0	-0.7 %
Q4 24	13,217.00	-75.0	-0.6 %
Q1 25	12,350.00	-33.0	-0.3 %
13,946.33	Cal 24	-99.25	-0.7 %
Cal 25	12,425.00	-42.0	-0.3 %
Cal 26	12,100.00	-58.0	-0.5 %



第六部分 燃油价格 BUNKER PRICE

MP	LO	HO	MO	SP	WoW	W%	M%
zhoushan	674.0	471.0	821.0	203.0	39.0	23.78	7.69
Singapore	613.5	459.5	759.5	154.0	14.5	10.39	-31.4
Rotterdam	557.0	459.0	771.5	98.0	2.0	2.08	11.36
Fujairah	619.5	415.0	909.5	204.5	27.5	15.54	-6.83
Houston	579.0	506.0	792.0	73.0	11.0	17.74	-19.34

(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	0.0	0.0	4.23	-21.54
Maize		231.0	3.0	1.32	3.29	-26.41
Soybeans		257.0	-1.0	-0.39	-1.21	-15.66
Rice		261.0	1.0	0.38	5.68	36.33
Barley		223.0	-1.0	-0.45	2.53	-27.39
Energy		Index	+/-	Weekly	Monthly	YTD
Crude Oil	USD/Bbl	75.08	4.03	5.67	0.03	-6.56
Brent	USD/Bbl	80.79	4.59	6.02	0.86	-4.41
Natural Gas	USD/MMBtu	2.52	-0.03	-1.18	-8.03	-51.16
Gasoline	USD/Gal	2.16	0.05	2.37	0.0	-9.24
Heating Oil	USD/Gal	2.67	0.06	2.3	-4.98	-19.82
Ethanol	USD/Gal	1.67	-0.01	-0.6	-11.17	-23.74
Naphtha	USD/T	636.39	6.45	1.02	1.71	7.63
Propane	USD/Gal	0.67	0.0	0.0	4.69	-2.9
Uranium	USD/Lbs	91.0	8.7	10.57	13.4	89.19
Methanol	CNY/T	2442.0	45.0	1.88	1.62	-3.93
TTF Gas	EUR/MWh	33.85	0.31	0.92	-24.74	-58.53
UK Gas	GBP/thm	90.7	6.91	8.25	-21.44	-54.67
Industrial		Index	+/-	Weekly	Monthly	YTD
Copper	USD/Lbs	3.9	0.04	1.04	3.45	-0.76
Coal	USD/T	145.5	0.2	0.14	19.26	-63.72
Steel	CNY/T	3956.0	95.0	2.46	0.3	-0.23
Iron Ore	USD/T	142.5	5.5	4.01	4.78	27.23
Aluminum	USD/T	2350.0	82.5	3.64	5.29	-1.65
Iron Ore Fe 62%	USD/T	2350.0	82.5	3.64	5.29	-1.65
Metals		Index	+/-	Weekly	Monthly	YTD
Gold	USD/t.oz	2067.3	46.9	2.32	2.73	14.3
Silver	USD/t.oz	24.06	0.16	0.67	-2.63	-0.33
Platium	USD/t.oz	972.2	27.7	2.93	4.07	-5.65
Currencies		Index	+/-	Weekly	Monthly	YTD
EUR/USD		1.11	0.02	1.83	1.83	3.74
USD/CNY		7.15	0.01	0.14	-0.14	2.58

第八部分 本周话题 WEEKLY TOPIC



元春始风华，万象启新程

对于航运来说2023年注定是不简单的一年，一年来干散货市场前三季度一直疲软，而在接近第四季度以来经历了冲高回落上下起伏的态势；而能源运输市场的船东在这一年获得不错的租金收入；化学品船运输市场国内和东南亚市场下滑明显，欧洲市场有一定韧性；集装箱市场总体下滑明显，远期因为过剩的运力而呈弱势。新造船市场自2008年回落以来达到历史的高位，而且将持续强势。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。

2023年接近尾声出来一个黑天鹅事件，红海胡赛武装问题扰动了红海的船舶通行，集装箱船东抓住机会涨价。索马里海盗终于又有机会于12月14日成功劫持一艘保加利亚的散货船。2023年巴拿马运河船舶通行因为干旱和中美贸易脱钩问题显著减少。2023年苏伊士运河船舶搁浅依然是船东面对的主要问题。

展望2024年，因为欧盟2024年开始对造访欧盟水域和港口的船舶实施碳排放配额管理，能耗高的船舶将逐步被欧盟市场所淘汰，市场可能出现大西洋市场远高于东南亚市场情况；红海胡赛武装问题因为巴以战争的结束而最终归于平静；新造船市场将继续高位运行；石化能源有一定的韧性加之供需的健康现状，油轮船东市场将继续受益。长远来看，随着市场对船舶绿色环保要求愈加严格，战略管理好的中大型船东企业会越来越健康，小型船东因为资金

和市场分化问题会逐步退出历史舞台。

新的一年2024年即将到来，感谢您对hiFleet的支持、信任和关照，祝大家新年更好。

For shipping 2023 is destined to be not a usual year, it is a year the dry bulk market stayed soft until the fourth quarter rushing high and cooling down trend. The shipowners in the energy transportation market gained a good hire for this year, and the domestic and Southeast Asian markets of the chemicals declined significantly while the European market had resilience. The overall down in the container market is obvious, and the future is weak because of future excess supply. The new shipbuilding market has reached a new high since the 2008 downturn. On May 16, 2023, the European Union officially takes shipping in the EU ETS and ship operators will be required to hand in a quota for each tonne of CO2 they emit.

Towards the end of 2023 came a black swan event, the Red Sea Houthi armed disrupted the usual flow of ships in the Red Sea, and container ship owners seized the opportunity to raise prices. Somali pirates finally had another chance to hijack a Bulgarian bulk carrier on December 14th. Ship traffic on the Panama Canal decreased significantly in 2023 due to drought and trade decoupling between China and the United States. The grounding of ships in the Suez Canal in 2023 remains a major problem for shipowners.

Looking forward to 2024, because the EU begins to implement carbon emission quota management for ships visiting EU waters and ports in 2024, ships with heavy emission will be gradually eliminated by the EU market, and the market may be much higher than the Atlantic market than the Southeast Asian market. The Houthi issue in the Red Sea will be finally calmed by the end of the Israeli-Palestinian war. The new shipbuilding market will stay strong. The tanker owners market will continue to benefit from the resilience of petrochemical energy and the healthy status of supply and demand. In the long run, as the market becomes more stringent on the green environmental protection requirements of ships, those large and medium-sized shipowners will be more and more healthy with reasonable strategic management, while small shipowners will gradually withdraw from the historical stage because of the problems of capital and market differentiation.

The New Year 2024 is coming we are grateful for your always kindness supporting, trusting and care for hiFleet, and wish you a better bright year.