



2024年 第11周市场周报

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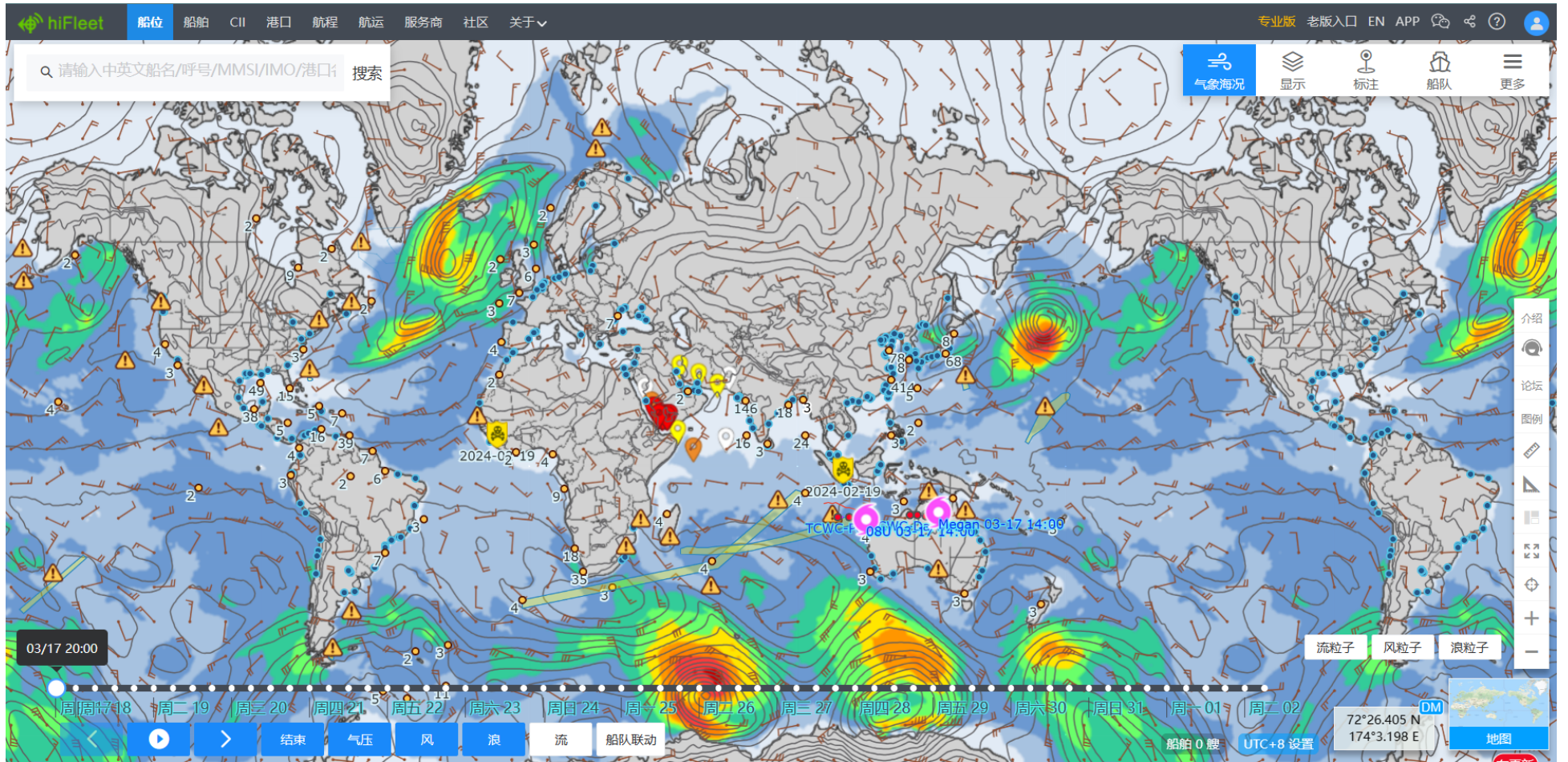
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本周话题 WEEKLY TOPIC

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1236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 1236 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、东海海域风力大部分时间维持5-6级偶尔7级，相关海域海浪将有1.5到2.5米中浪；台湾海峡风力有6-7级，台湾海峡洋面海浪将经历3米大浪，南海大部海域风力增强到6-7级，有3米大浪。我国近海易发生海雾过程。大西洋和太平洋北部区域低压活动偶尔增强，海域海况变得恶劣。The coming week the wind in Bohai Sea, Yellow Sea and China East Sea stay breeze and near gale occasionally with the seas from light to moderate. The wind in the Taiwan Strait might reach near gale and the sea in the Taiwan Strait happens to experience rough. In most of the South China Sea the wind is strengthening to near gale with rough sea. Low-pressure in the north of North Atlantic Ocean and Pacific are becoming strong occasionally, sea conditions are rough.

海盗事件 Piracy

北京时间3月12日下午3点左右，在索马里摩加迪沙东北1100海里处发生海盗劫持事件，船上所有23名船员都被劫持为人质。At around 3 PM Beijing time on March 12, the pirate hijacking incident occurred 1,100 nautical miles northeast of Mogadishu, Somalia, and all 23 crew members on board were taken hostage.

海上事件 Marine Incidents

3月16日报，印度海军在打击死灰复燃的索马里海盗行动中取得重大胜利，将一艘被劫持者控制的保加利亚商船RUEN轮逼入了死角，并救出了被劫持数月的船舶上全部17名船员。The Indian Navy has scored a dramatic victory against resurgent Somali piracy by cornering a Navibulgar ship under the control of hijackers and rescuing all 17 crew members, the vessel RUEN had been held hostage for months.

其它 Others

无。Nil.

备注 Remark

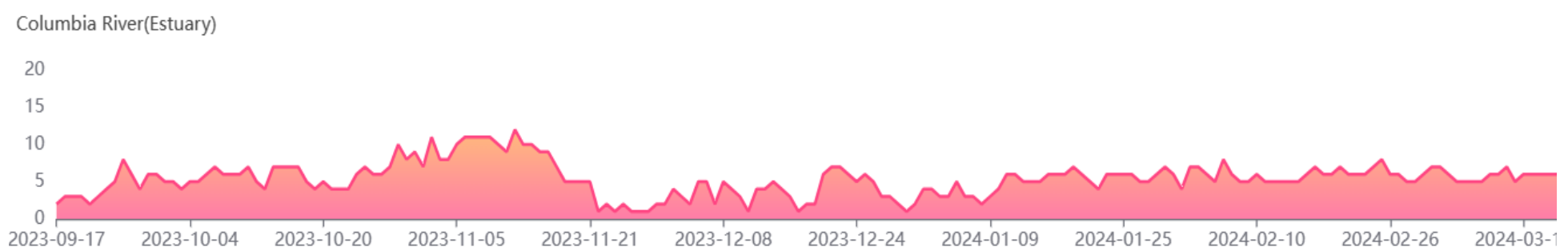
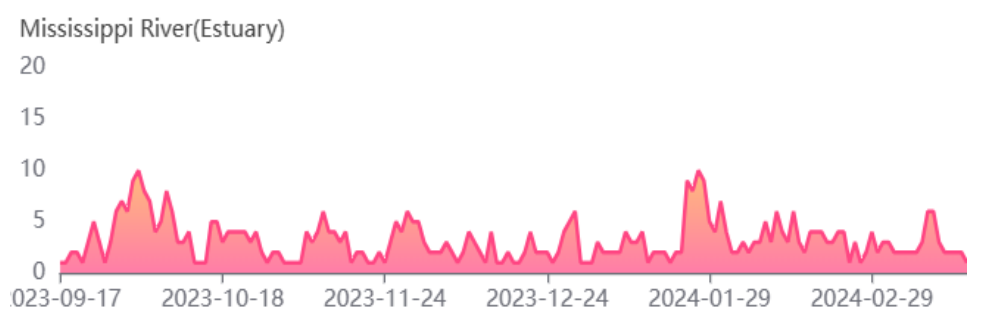
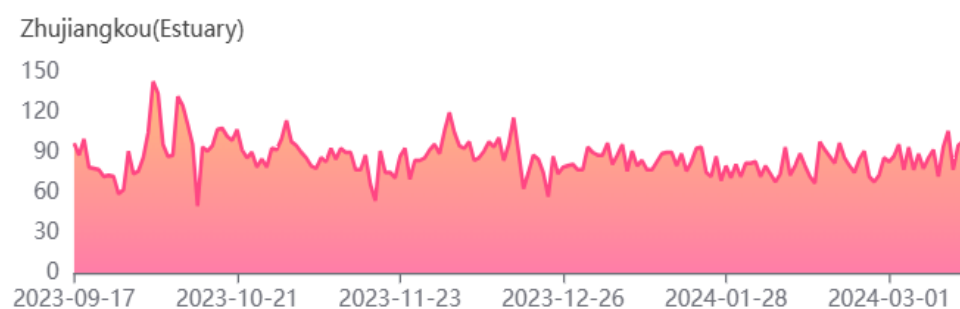
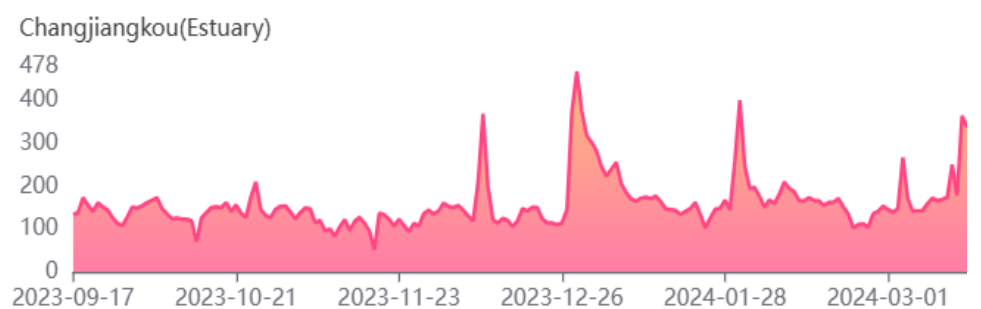
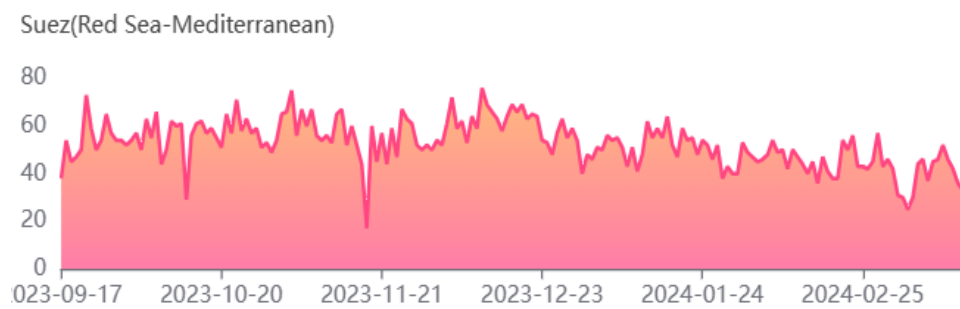
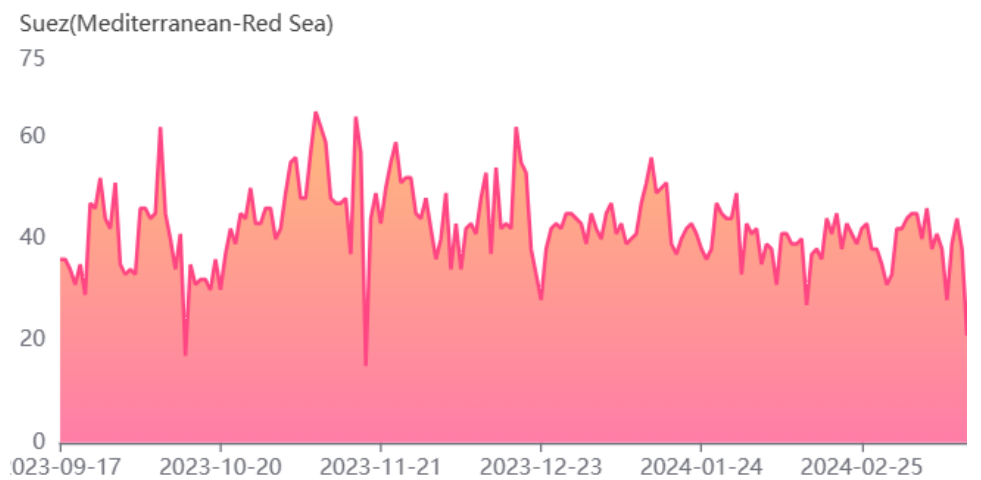
本报告数据截止时间为2024年3月17日北京时间17点；所有数据和或观点仅供参考，在任何情况下本公司及其员工不承担任何风险。The data deadline for this report is Beijing time 17 hours on Mar 17 of 2024; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

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	30	1211	42	-144
Miss.Riv.	1	74	2	-48
CJK	338	4907	467	-255
Pa.Atlan.	45	1329	-36	-43
Colum.Riv.	6	174	3	9
Suez.Med.	21	1142	-55	-9
Pa.Pac.	61	1440	-15	130
ZJK	86	2469	31	145

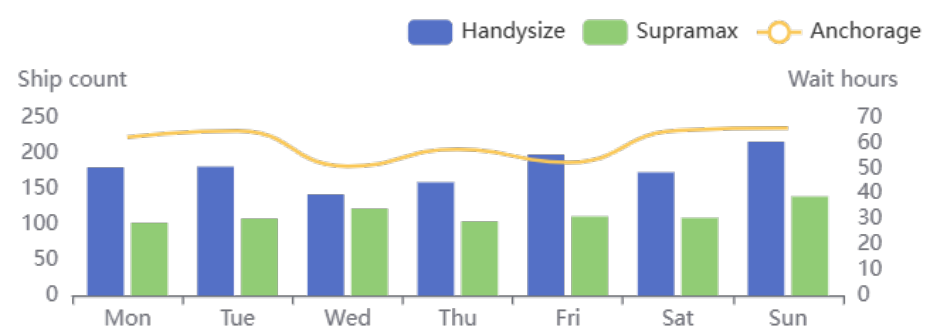


(P.N.-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

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

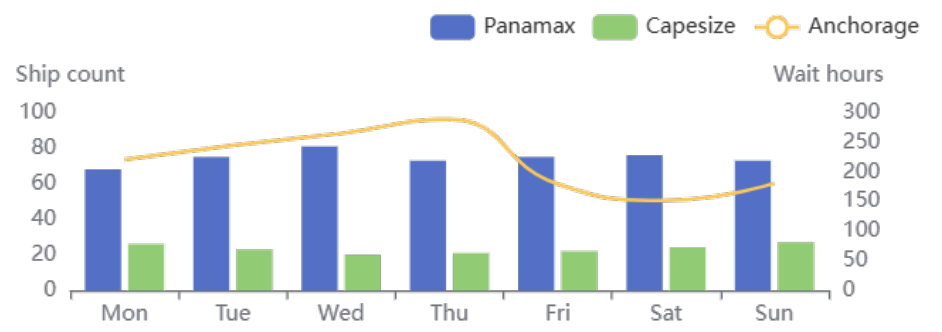
Type	M	T	W	Th	F	Sat	Sun
HDY	180	181	142	159	198	173	216
SMX	102	108	122	104	111	109	139
WT.h.	62.3	64.8	50.8	57.6	52.3	65.0	66



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

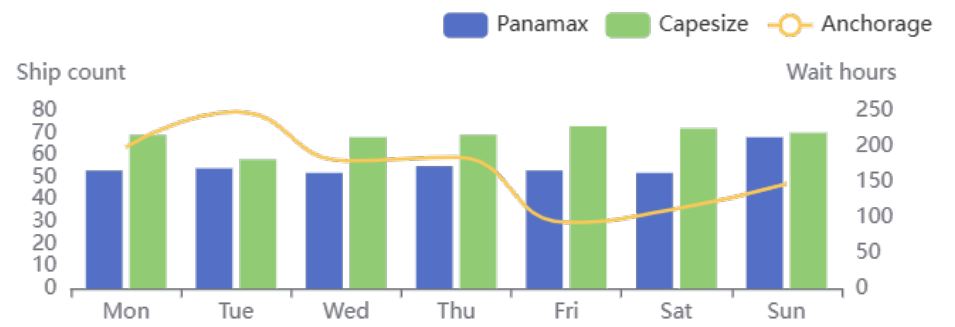
Type	M	T	W	Th	F	Sat	Sun
Pan.	68	75	81	73	75	76	73
Cap	26	23	20	21	22	24	27
WT.h.	220.8	244.8	264.9	288.9	179.5	151.7	181



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

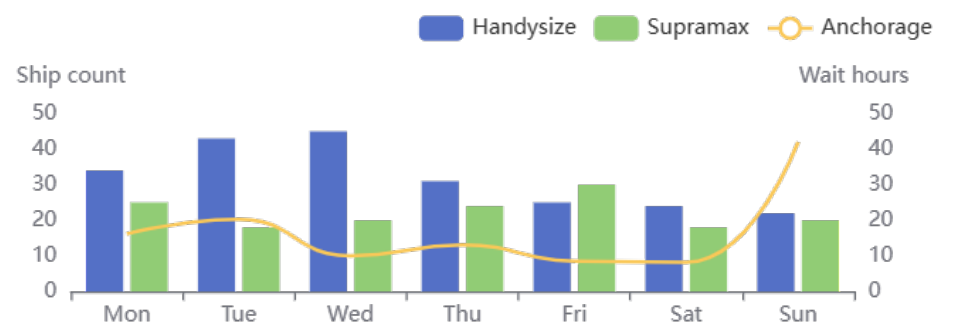
Type	M	T	W	Th	F	Sat	Sun
Pan.	53	54	52	55	53	52	68
Cap	69	58	68	69	73	72	70
WT.h.	198.4	248.3	179.55	184.5	92.9	112.1	147



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

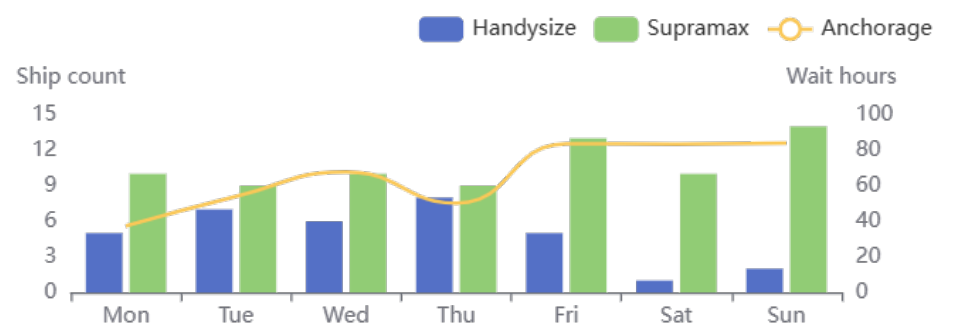
Type	M	T	W	Th	F	Sat	Sun
HDY	34	43	45	31	25	24	22
SMX	25	18	20	24	30	18	20
WT.h.	16.2	20.3	10	13.1	8.5	8.2	42



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

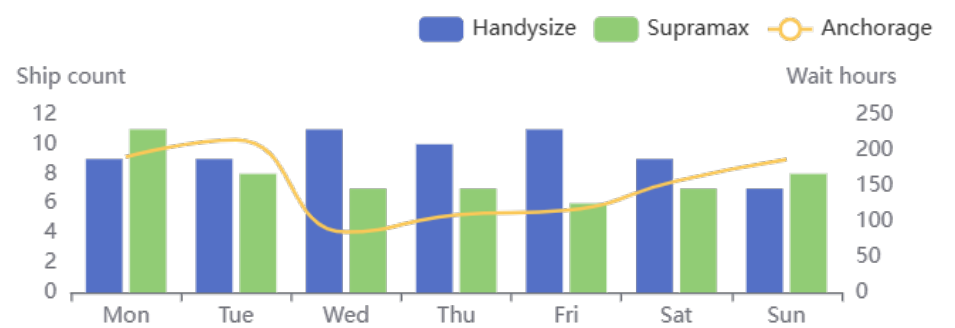
Type	M	T	W	Th	F	Sat	Sun
HDY	5	7	6	8	5	1	2
SMX	10	9	10	9	13	10	14
WT.h.	37.4	53.95	67.8	50.2	83.6	83.4	84



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

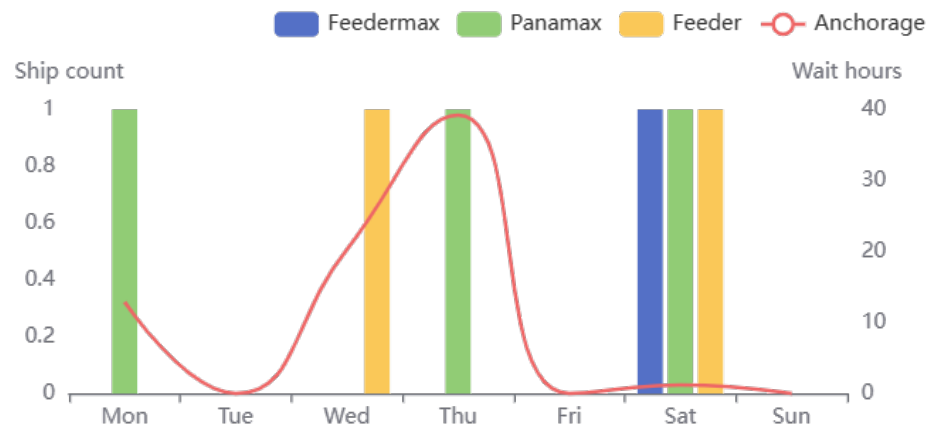
Type	M	T	W	Th	F	Sat	Sun
HDY	9	9	11	10	11	9	7
SMX	11	8	7	7	6	7	8
WT.h.	190.5	214.5	84.8	108.8	115.5	156.8	187



最近一周香港区域集装箱船锚泊数量和平均等待时长

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

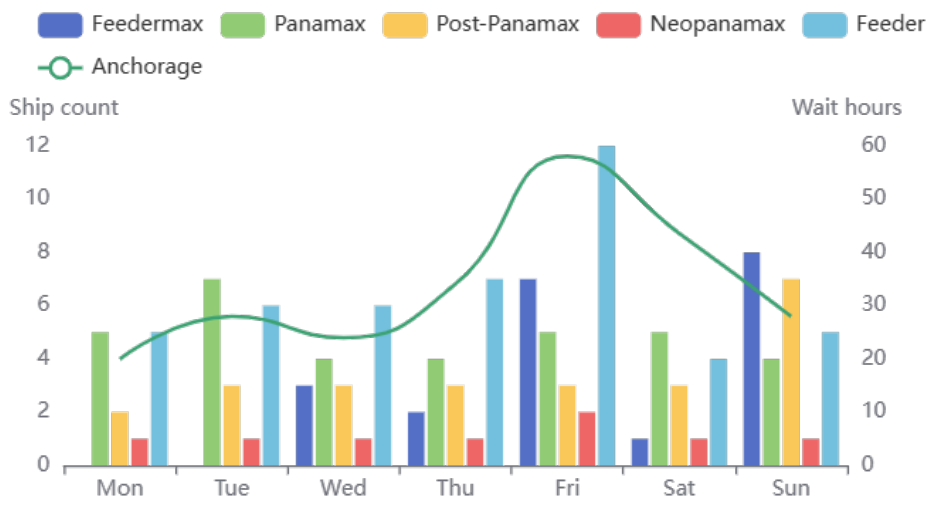
Type	M	T	W	Th	F	Sat	Sun
F.ma.	0	0	0	0	0	1	0
Pan.	1	0	0	1	0	1	0
PPx	0	0	0	0	0	0	0
NPx	0	0	0	0	0	0	0
Fd	0	0	1	0	0	1	0
WT.h.	12.9	0.0	20.3	39.2	0.0	1.2	0.0
UlcV	0	0	0	0	0	0	0



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

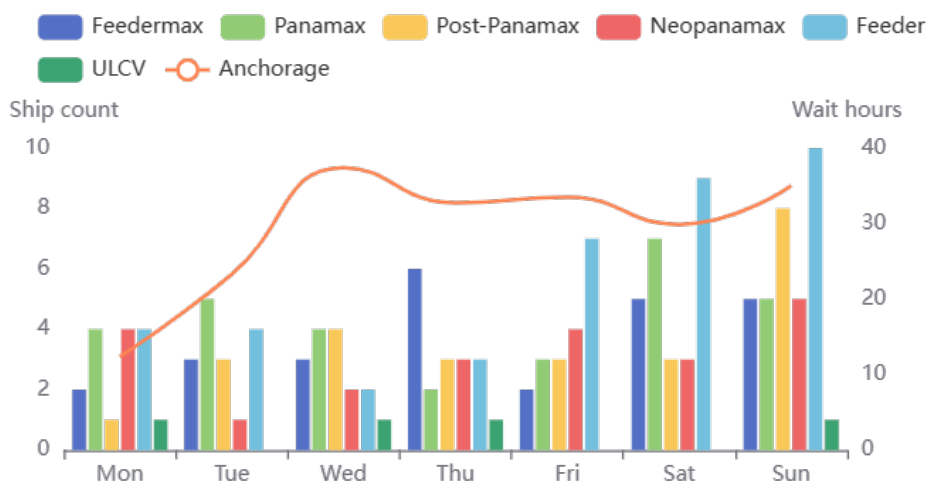
Type	M	T	W	Th	F	Sat	Sun
F.ma.	0	0	3	2	7	1	8
Pan.	5	7	4	4	5	5	4
PPx	2	3	3	3	3	3	7
NPx	1	1	1	1	2	1	1
Fd	5	6	6	7	12	4	5
UlcV	0	0	0	0	0	0	0
WT.h.	20	28	24	34.1	58.1	43.6	28



最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

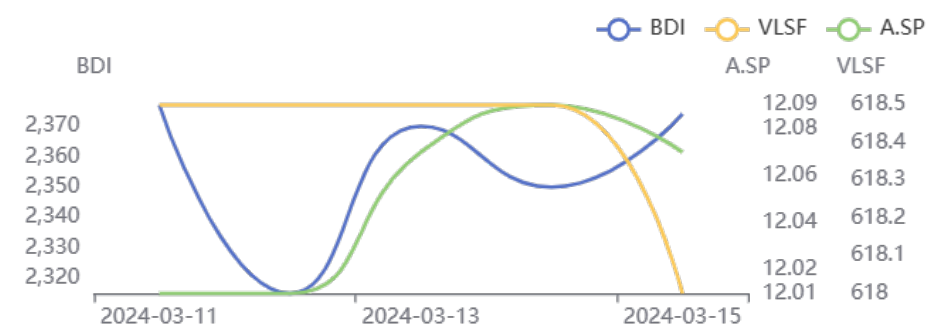
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

Type	M	T	W	Th	F	Sat	Sun
F.ma.	2	3	3	6	2	5	5
Pan.	4	5	4	2	3	7	5
PPx	1	3	4	3	3	3	8
NPx	4	1	2	3	4	3	5
Fd	4	4	2	3	7	9	10
UlcV	1	0	1	1	0	0	1
WT.h.	12.4	23.3	37.4	32.75	33.5	29.9	35



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

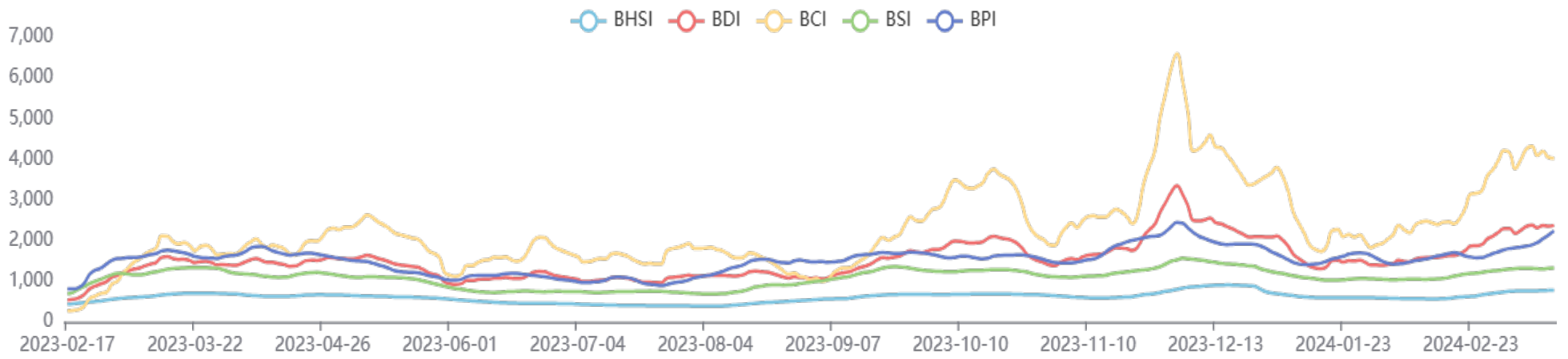
Type	M	T	W	Th	F	Sat	Sun
BDI	1893	1949	2043	2133	2234		
VLSF	618.50	618.50	618.50	618.50	618.00		
A.SP	12.01	12.01	12.07	12.09	12.07	11.98	



第三部分 航运市场 SHIPPING MARKET

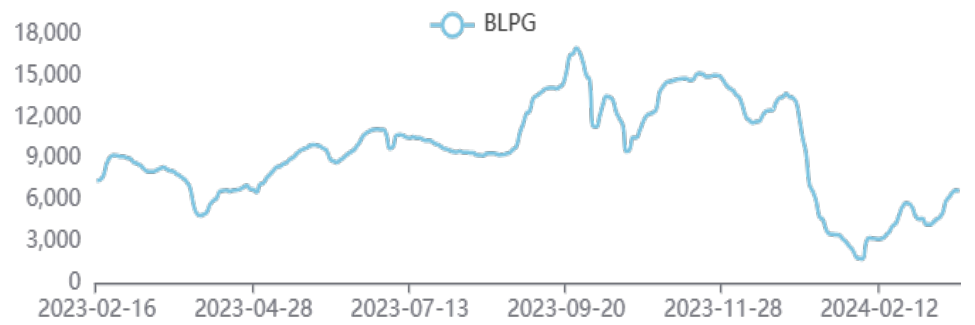
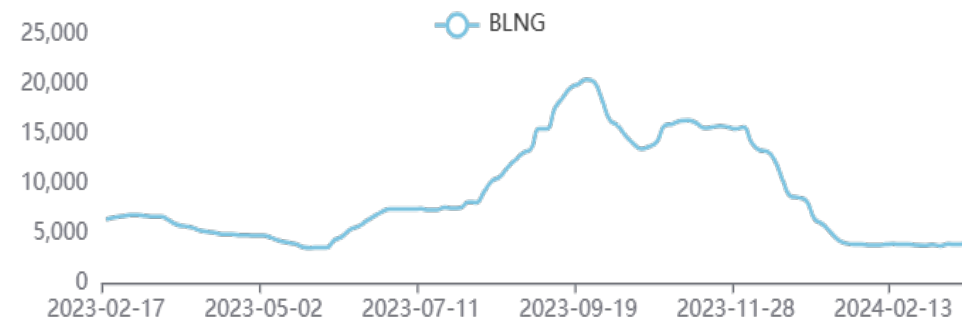
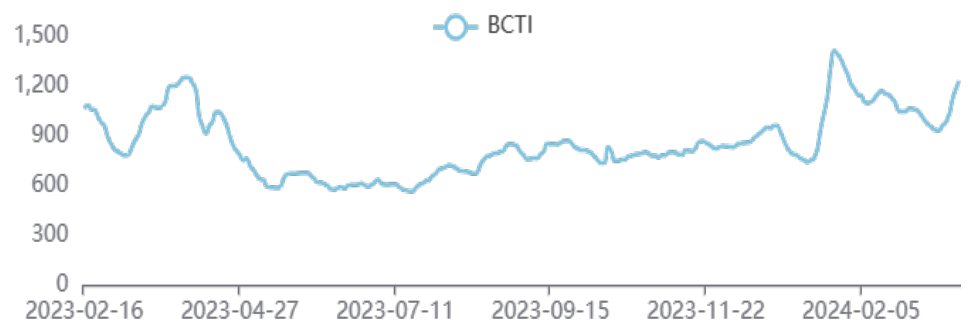
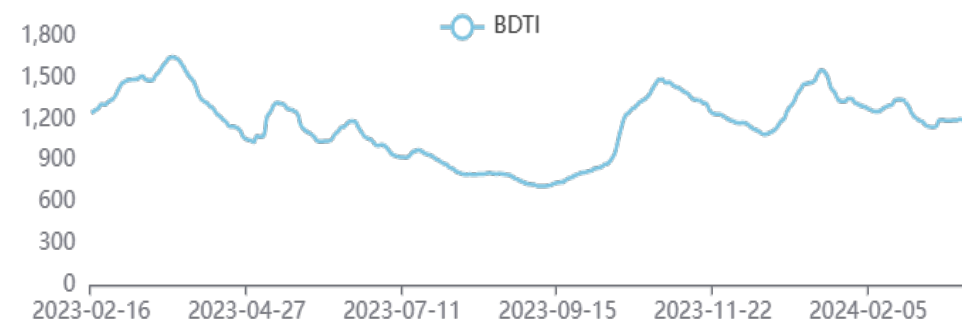
波罗的海干散货指数Baltic Dry Index

Type	PI	WoW	W%	M%	y%
BDI	2374	29.0	1.24	47.45	48.1
BCI	4019	-226.0	-5.32	64.17	91.02
BPI	2234	373.0	20.04	35.72	26.36
BSI	1326	8.0	0.61	23.81	2.31
BHSI	781	19.0	2.49	36.54	15.53



能源运价指数Energy Shipping Index

Type	PI	WoW	W%	M%	y%
BDTI	1202	16.0	1.35	-10.37	-20.71
BCTI	1229	270.0	28.15	8.86	18.17
BLNG	3909	15.0	0.39	0.96	-37.65
BLPG	6664	1583.0	31.16	61.55	-19.5



第四部分 运力分布 SUPPLY DISTRIBUTION

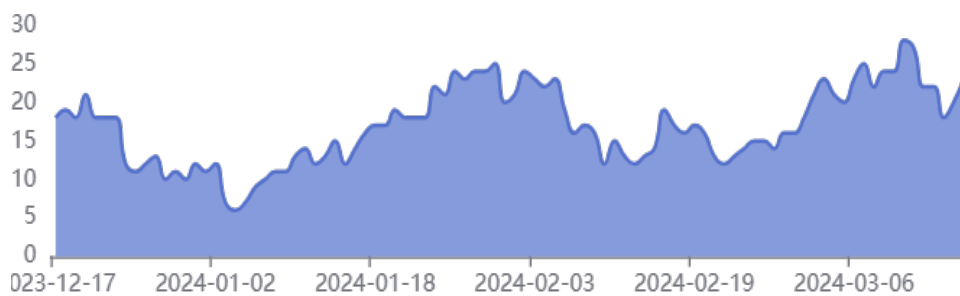


好望角型散货船 Capesize

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.

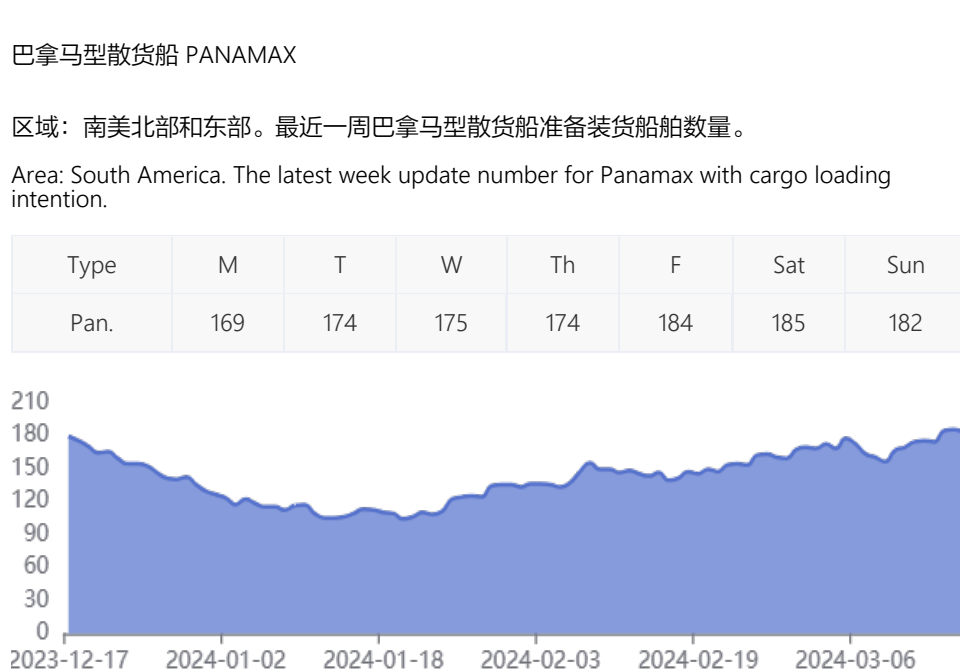
Type	M	T	W	Th	F	Sat	Sun
Cape	28	27	22	22	18	20	23



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.

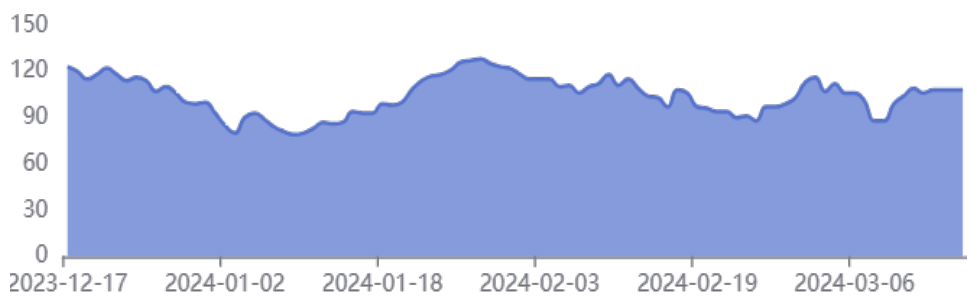
Type	M	T	W	Th	F	Sat	Sun
Cape	30	35	38	37	43	37	37



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.

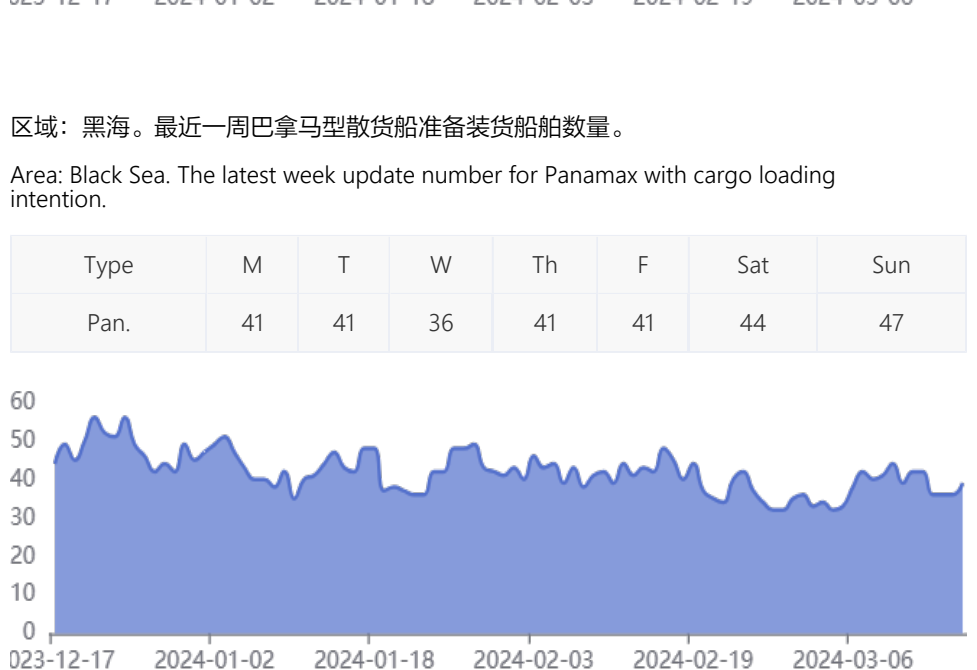
Type	M	T	W	Th	F	Sat	Sun
Cape	104	109	106	108	108	108	108



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.	41	41	36	41	41	44	47

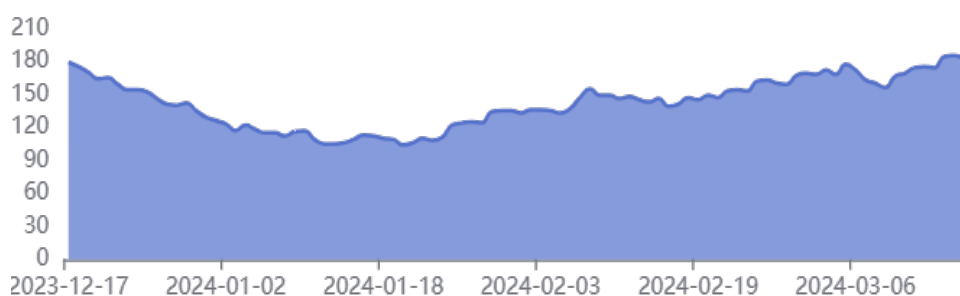


巴拿马型散货船 PANAMAX

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.

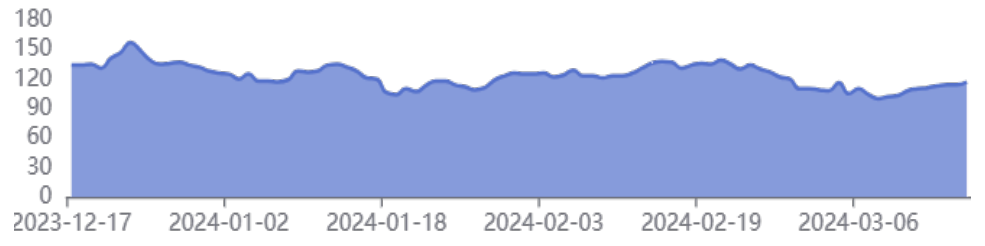
Type	M	T	W	Th	F	Sat	Sun
Pan.	169	174	175	174	184	185	182



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.	108	110	111	113	114	114	117

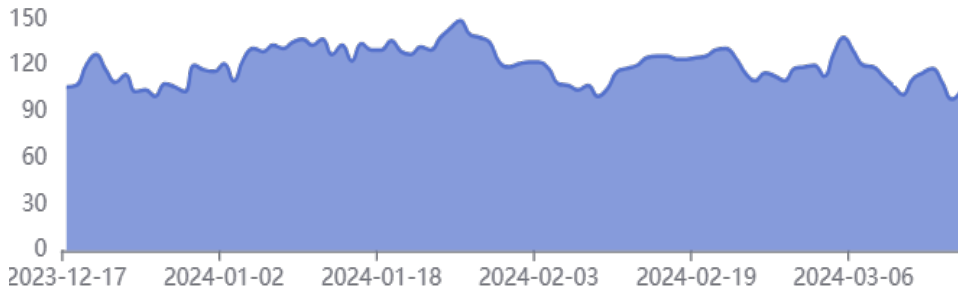


超大灵便型散货 SUPRAMAX

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.

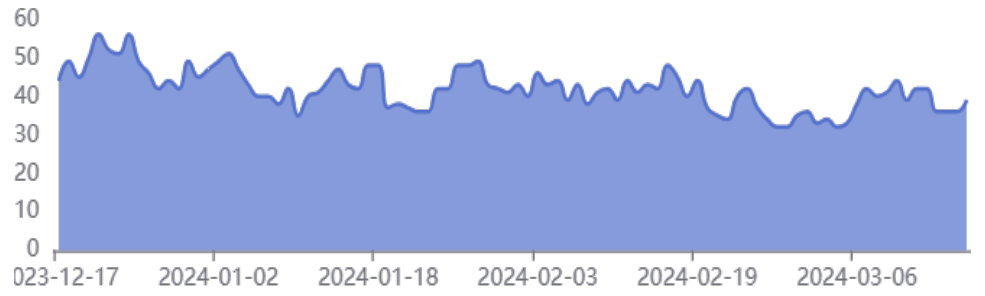
Type	M	T	W	Th	F	Sat	Sun
SMX	101	111	115	118	109	98	104



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.

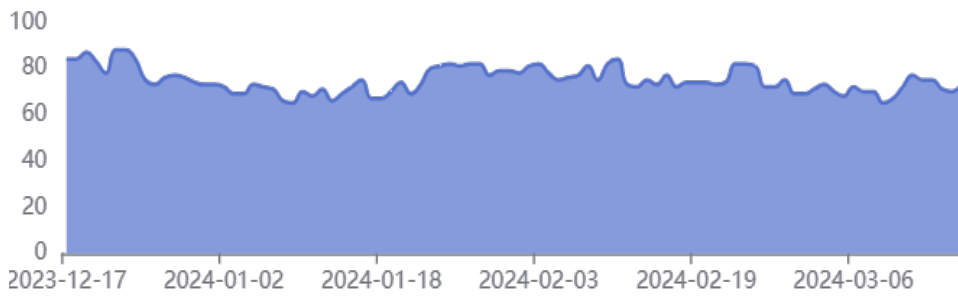
Type	M	T	W	Th	F	Sat	Sun
SMX	39	42	42	36	36	36	39



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.

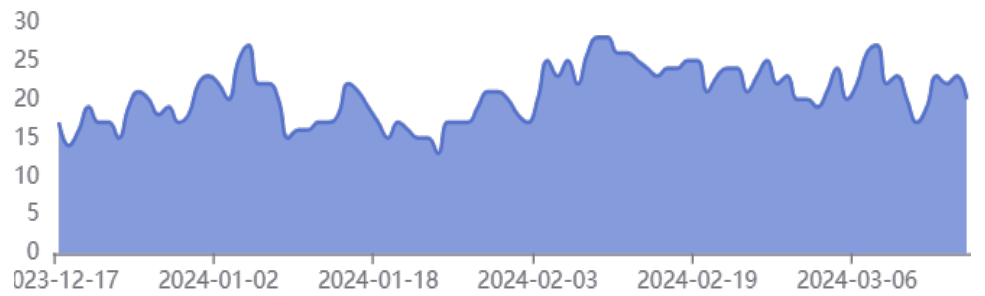
Type	M	T	W	Th	F	Sat	Sun
SMX	20	17	19	23	22	23	20



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.

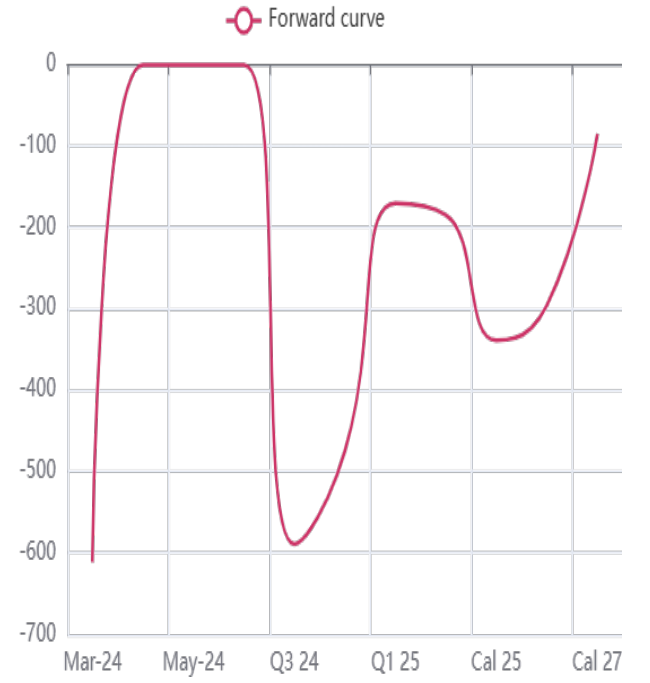
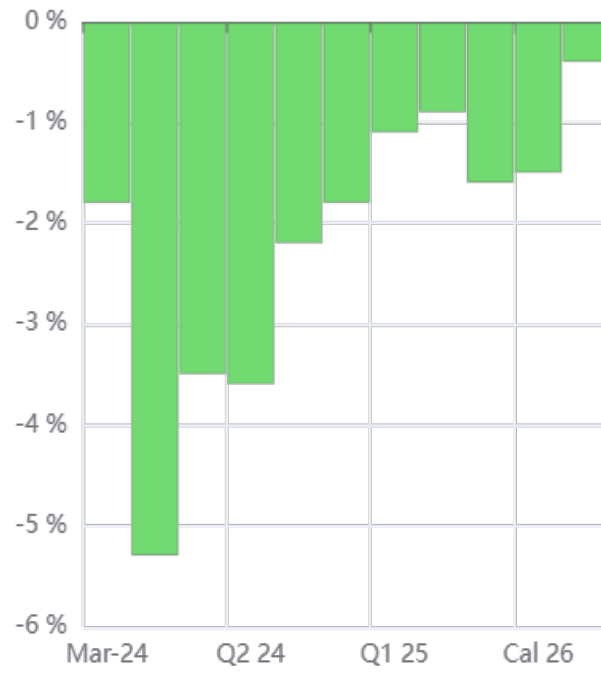
Type	M	T	W	Th	F	Sat	Sun
SMX	72	77	75	75	71	70	73



第五部分 远期运价协议 FFA

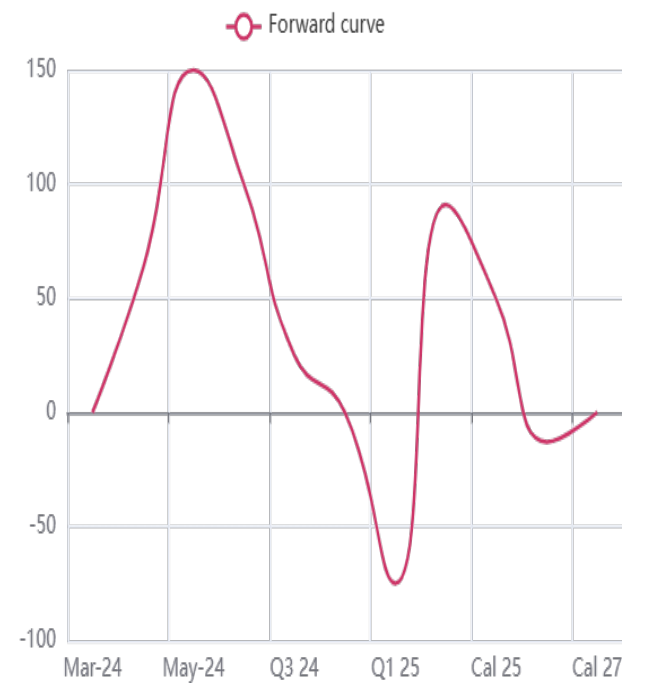
好望角型散货船Capesize

5TC	\$/day	WoW	
Mar-24	32,432.00	-611.0	-1.8 %
Apr-24	31,875.00	-1789.0	-5.3 %
May-24	30,907.00	-1129.0	-3.5 %
Q2 24	30,717.67	-1162.0	-3.6 %
Q3 24	26,575.00	-589.0	-2.2 %
Q4 24	25,939.00	-475.0	-1.8 %
Q1 25	16,079.00	-171.0	-1.1 %
Q2 25	20,336.00	-185.0	-0.9 %
Cal 25	20,807.00	-339.0	-1.6 %
Cal 26	19,879.00	-296.0	-1.5 %
Cal 27	19,414.00	-86.0	-0.4 %



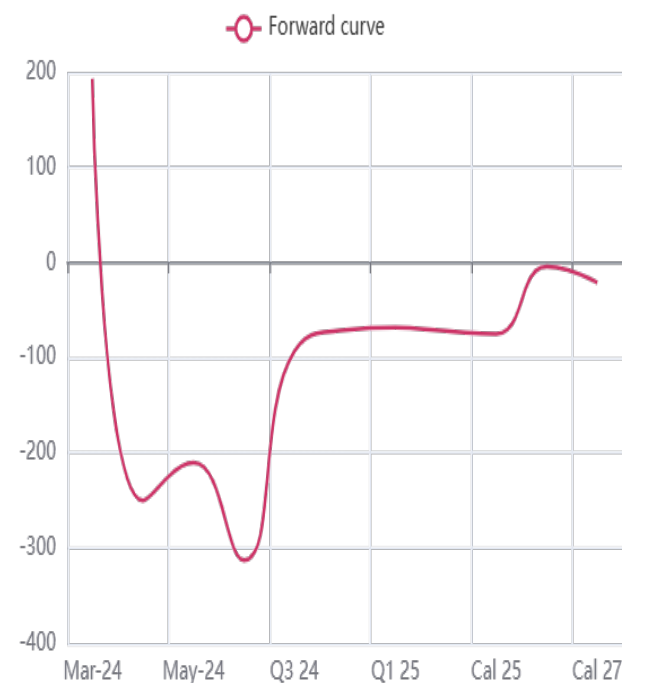
灵便型散货船Handysize

7TC	\$/day	WoW	
Mar-24	14,013.00	0.0	0.0 %
Apr-24	15,438.00	63.0	0.4 %
May-24	14,950.00	150.0	1.0 %
Q2 24	14,837.67	100.0	0.7 %
Q3 24	13,588.00	25.0	0.2 %
Q4 24	13,175.00	0.0	0.0 %
Q1 25	11,738.00	-75.0	-75.0 %
Q2 25	12,371.00	91.0	0.7 %
Cal 25	12,212.75	49.5	0.4 %
Cal 26	11,750.00	-13.0	-0.1 %
Cal 27	11,613.00	0.0	0.0 %



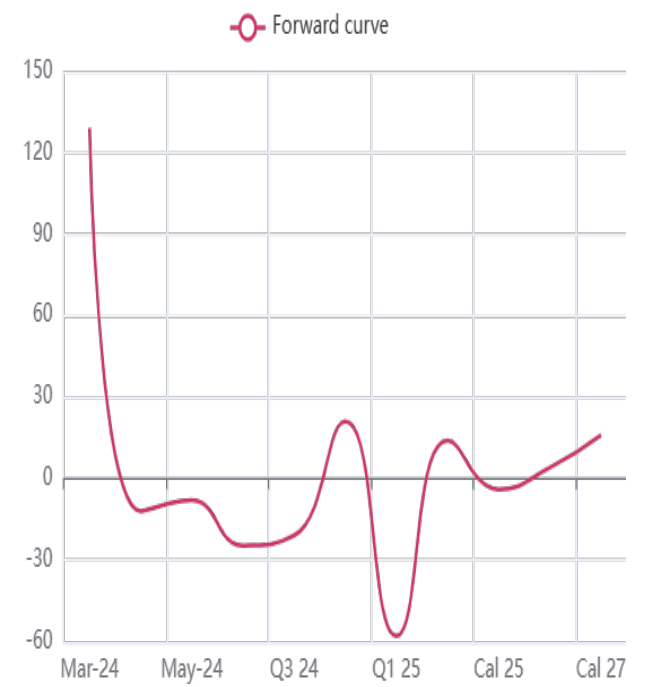
巴拿马型散货船Panamax

4TC	\$/day	WoW	
Mar-24	17,629.00	193.0	1.1 %
Apr-24	19,775.00	-250.0	-1.2 %
May-24	19,436.00	-210.0	-1.1 %
Q2 24	18,934.67	-312.67	-1.6 %
Q3 24	16,518.00	-93.0	-0.6 %
Q4 24	15,061.00	-71.0	-0.5 %
Q1 25	12,832.00	-68.0	-0.5 %
Q2 25	13,921.00	-72.0	-0.5 %
Cal 25	13,318.00	-75.0	-0.6 %
Cal 26	12,496.00	-4.0	0.0 %
Cal 27	12,129.00	-21.0	-0.2 %



超大灵便型散货船Supramax

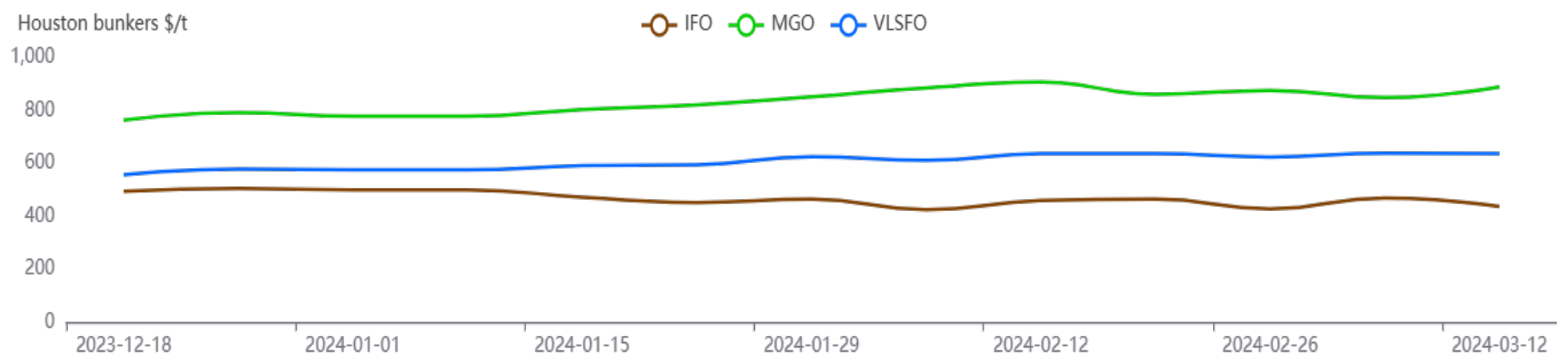
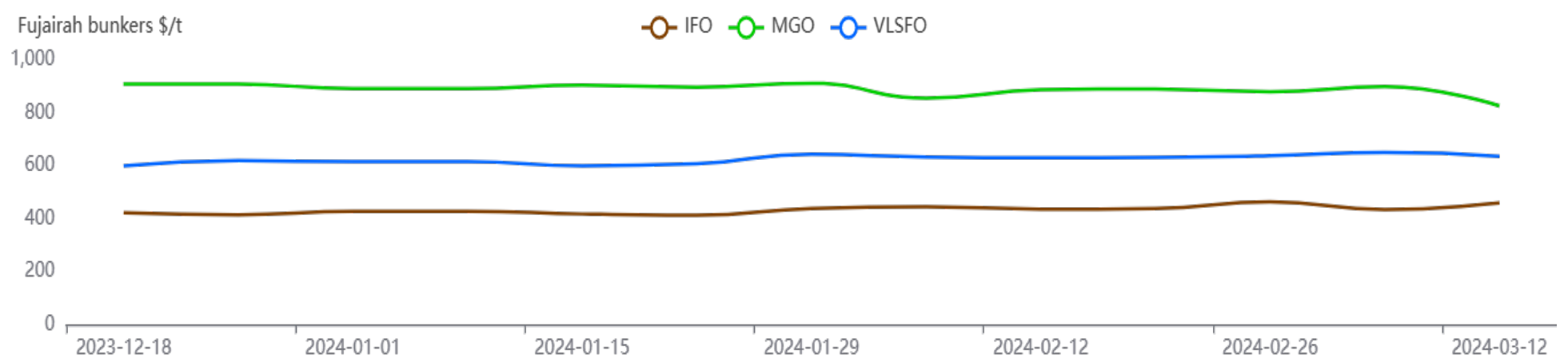
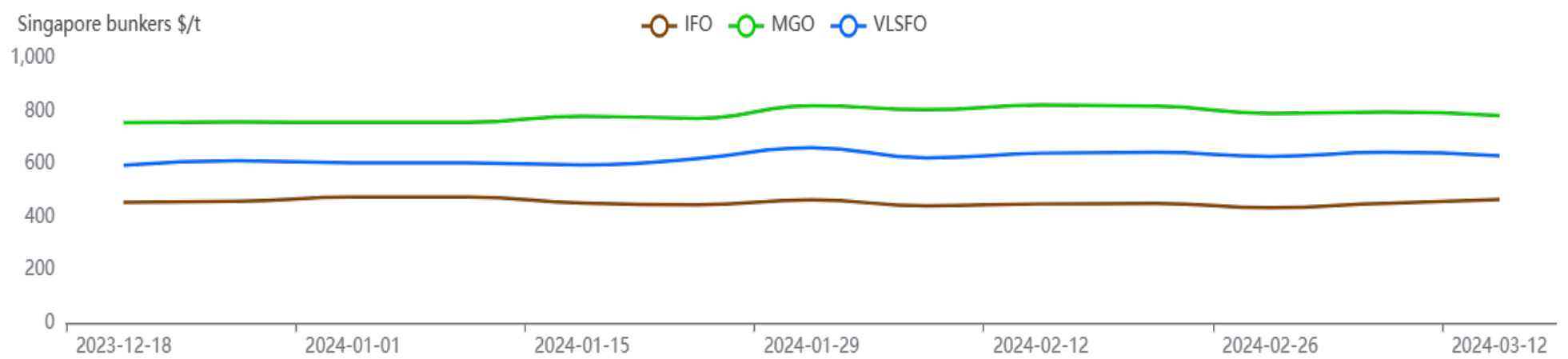
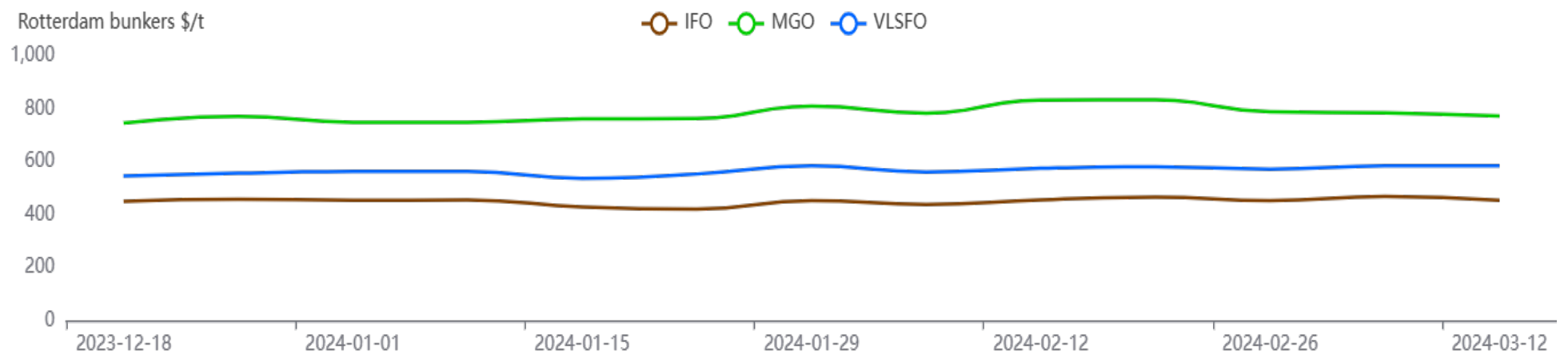
10TC	\$/day	WoW	
Mar-24	14,883.00	129.0	0.9 %
Apr-24	16,463.00	-12.0	-0.1 %
May-24	16,425.00	-8.0	0.0 %
Q2 24	16,183.67	-24.67	-0.2 %
Q3 24	15,042.00	-21.0	-0.1 %
Q4 24	14,063.00	21.0	0.1 %
Q1 25	12,250.00	-58.0	-0.5 %
Q2 25	12,850.00	14.0	0.1 %
12,700.00	Cal 25	-4.0	0.0 %
Cal 26	12,233.00	4.0	0.0 %
Cal 27	11,958.00	16.0	0.1 %



第六部分 燃油价格 BUNKER PRICE

MP	LO	HO	MO	SP	WoW	W%	M%
zhoushan	623.5	462.5	819.0	161.0	-20.0	-11.05	-17.01
Singapore	632.5	466.5	784.5	166.0	-27.5	-14.21	-13.54
Rotterdam	585.5	455.0	773.0	130.5	14.5	12.5	9.66
Fujairah	636.5	460.5	826.5	176.0	-40.0	-18.52	-9.74
Houston	637.0	437.5	889.5	199.5	30.0	17.7	12.39

(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		199.0	-4.0	-1.97	-7.44	-25.02
Maize		196.0	6.0	3.16	-1.01	-34.2
Soybeans		256.0	43.0	20.19	17.97	-14.47
Rice		220.0	-36.0	-14.06	-16.35	12.37
Barley		201.0	-3.0	-1.47	-5.19	-29.11
Energy		Index	+/-	Weekly	Monthly	YTD
Crude Oil	USD/Bbl	77.97	-2.16	-2.7	2.16	-0.74
Brent	USD/Bbl	82.16	-1.72	-2.05	0.59	-2.91
Natural Gas	USD/MMBtu	1.82	-0.06	-3.19	0.0	-31.84
Gasoline	USD/Gal	2.54	-0.07	-2.68	9.01	-6.27
Heating Oil	USD/Gal	2.64	-0.06	-2.22	-9.28	-7.37
Ethanol	USD/Gal	1.57	0.09	6.08	-1.26	-28.96
Naphtha	USD/T	687.7	-0.16	-0.02	3.42	-6.46
Propane	USD/Gal	0.8	-0.06	-6.98	-13.04	-12.09
Uranium	USD/Lbs	93.5	-1.5	-1.58	-11.79	85.33
Methanol	CNY/T	2592.0	47.0	1.85	0.82	-1.14
TTF Gas	EUR/MWh	26.35	1.46	5.87	0.34	-38.51
UK Gas	GBP/thm	66.07	3.97	6.39	2.56	-38.45
Industrial		Index	+/-	Weekly	Monthly	YTD
Copper	USD/Lbs	3.89	0.01	0.26	5.71	-3.47
Coal	USD/T	134.4	2.4	1.82	11.44	-28.21
Steel	CNY/T	3571.0	-130.0	-3.51	-8.46	-15.1
Iron Ore	USD/T	117.5	0.0	0.0	-8.2	-8.91
Aluminum	USD/T	2244.0	13.5	0.61	1.42	-5.79
Iron Ore Fe 62%	USD/T	2244.0	13.5	0.61	1.42	-5.79
Metals		Index	+/-	Weekly	Monthly	YTD
Gold	USD/t.oz	2181.0	96.9	4.65	7.8	17.98
Silver	USD/t.oz	24.3	1.2	5.19	6.11	15.28
Platium	USD/t.oz	917.4	27.0	3.03	4.77	-4.6
Currencies		Index	+/-	Weekly	Monthly	YTD
EUR/USD		1.09	0.01	0.93	0.93	2.83
USD/CNY		7.19	-0.02	-0.28	-0.42	3.6

第八部分 本周话题 WEEKLY TOPIC



2023年铁矿石运输数据

根据HiFleet数据统计，2023年全球铁矿石海运贸易共计装船10015艘次（仅统计不同国家和地区之间的贸易），发货总量约15.76亿吨（不包括混矿转运），与2022年同比增长4.6%。其中，澳大利亚铁矿发运量约9.4亿吨，与2022年同期增长4000万吨，增幅4%，澳大利亚铁矿石出口保持20多年不间断的增长；巴西铁矿发运3.6亿吨，同比增加4300万吨，增幅为13%，巴西铁矿发运较上年同期整体好转很多，主要为CSN以及托克贡献，但巴西矿难给供应端带来的缺口仍未能完全恢复；印度对中国铁矿石出口量反弹，伊朗出口量也在增加。

从矿山的发运来看，力拓（RIO TINTO）2023年发运量为3.28亿吨，恢复至2020年的水平；必和必拓（BHPB）发运量2.89亿吨，处于近三年平均水平；FMG的发运量1.87亿吨，与2022年同比增加约2.5%，约460万吨。淡水河谷（VALE）铁矿石的发运量为2.69亿吨，完成了其发运目标下沿（3.1亿吨）的86.8%，较上年有很大进步，但全年表现仍不及预期。

2023年，中国仍是铁矿石贸易的主导，推动了海运铁矿石需求；中国钢厂的钢铁产量受到净出口增长的支撑，电炉炼钢（废钢炼钢）的兴起并未对高炉炼钢（消耗铁矿石和炼焦煤）产生影响。根据HiFleet海运数据，2023年中国海运铁矿石到港总量为12亿吨，同比增长8000万吨，涨幅7%。HiFleet与中国海关统计铁矿石月度进口量对比，月度误差率保持在3%以内，平均月度误差率仅为2%。近些年，铁矿石混矿业

务在中国港口遍地开花，2023年中国铁矿石转口在传统的华东-日韩业务基础上，又添新业务—湛江港转口越南。

According to the data of HiFleet, the global seaborne trade of iron ore in 2023 amounted to 10,015 voyages (only counting trade between different countries or regions), with a total shipment of 1.576 billion tons (excluding transshipment of mixed ore), representing a 4.6% increase compared to 2022. Among them, Australia's iron ore shipment was about 940 million tons, an increase of 40 million tons compared to 2022, with a growth rate of 4%. Australia's iron ore exports have maintained an uninterrupted increasing more than 20 years. Brazil's iron ore shipment for 2023 was 360 million tons, an increase of 43 million tons (13%) compared to the previous year, mainly contributed by CSN and Trafigura, while there still be some short of the pre-Brumadinho dam disaster peak in 2018. A rebound in Indian ore shipments to China has gone hand in hand with higher volumes from Iran.

Rio Tinto's shipment volume in 2023 was 328 million tons, returning to the level of 2020. BHPB's shipment volume was 289 million tons, at the average level of the past three years. FMG's shipment volume was 187 million tons, an increase of about 2.5% compared to 2022, about 4.6 million tons. Vale's iron ore shipment volume was 269 million tons, achieving 86.8% of its lower shipment target (310 million tons), showing significant progress compared to the previous year, but the annual performance was still not as expected.

In 2023, China remained the dominant position in iron ore trade, driving seaborne iron ore demand. Steel output at China's mills has been supported to a large degree by growth in net exports, while the electric arc furnace (scrap steel steelmaking) has not conflict with blast furnace (consumes iron ore and coking coal). According to HiFleet, China's total seaborne iron ore imported in 2023 was about 1.2 billion tons, an increase of 80 million tons compared to 2022, a rise of 7%. HiFleet has compared its data with official statistics of Chinese customs showed a monthly error rate of less than 3%, with an average monthly error rate of only 2%. In recent years, the business of iron ore blending has flourished in Chinese ports. In 2023, in addition to the traditional Huadong-Japan/Korea business, China's iron ore transshipment added new business—transshipment to Vietnam via Zhanjiang.