



2024年 第14周市场周报

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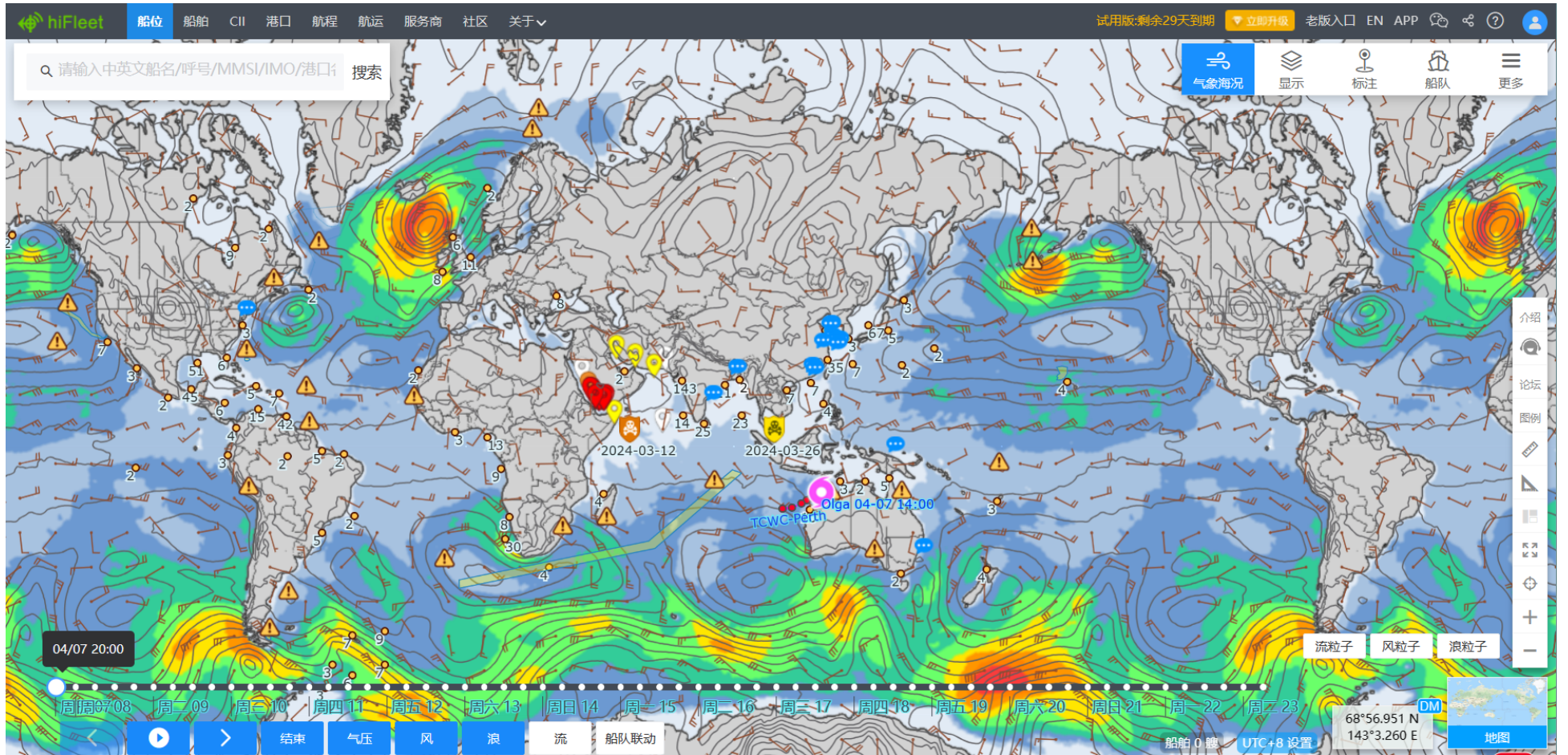
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本周话题 WEEKLY TOPIC

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873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 873 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级逐渐减弱到4-5级，相关海域海浪将从2.5米中浪到1米轻浪；台湾海峡风力有时7级，台湾海峡洋面海浪将经历3米大浪，南海大部海域风力维持在4-5级，有中浪。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，海域海况有时恶劣。The coming week the wind in Bohai Sea, Yellow Sea and China East Sea become weaker from breeze to moderate with the seas from moderate to slight. 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 stays moderate with moderate sea. Low-pressure in the north of North Atlantic and Pacific Ocean become strong occasionally, sea conditions sometimes are rough.

海盗事件 Piracy

最近一周没有海盗事件报告。There is no pirate report for the last week.

海上事件 Marine Incidents

一艘船长报告说，在中东海湾航行期间，导航系统受到“电子干扰”。英国海上贸易行动(UKMTTO)表示，事件发生在周二晚上11点开始的两个多小时内，地点在沙特阿拉伯拉斯祖尔(Ras Al Zour)以东95海里处。UKMTTO补充说，这艘未命名的船只的电子导航系统出现了故障，包括GPS和AIS。A vessel captain has reported “electronic interference” in navigation systems during a Middle East Gulf passage. UK Maritime Trade Operations (UKMTTO) said the incident took place over two hours from 11pm on Tuesday, 95 nautical miles east of Ras Al Zour in Saudi Arabia. The unnamed ship experienced disruption to electronic navigation systems, UKMTTO added, including its GPS and AIS.

其它 Others

没有 Nil

备注 Remark

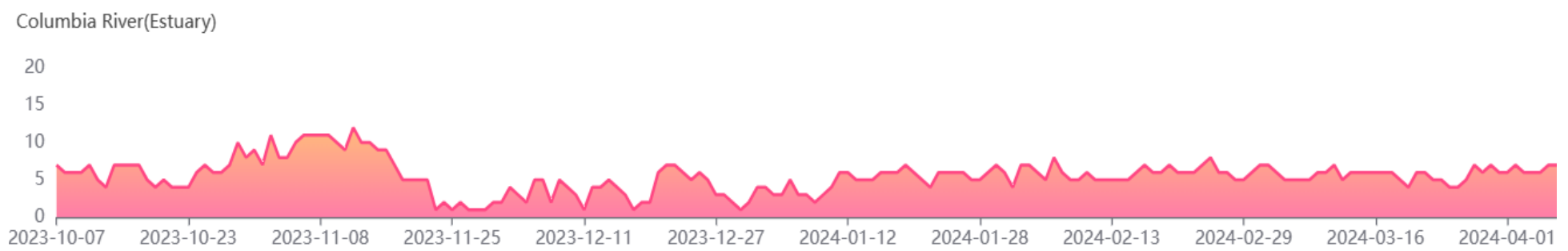
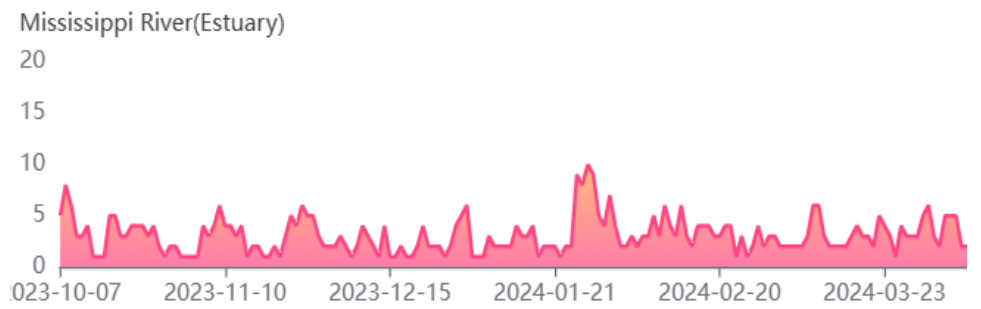
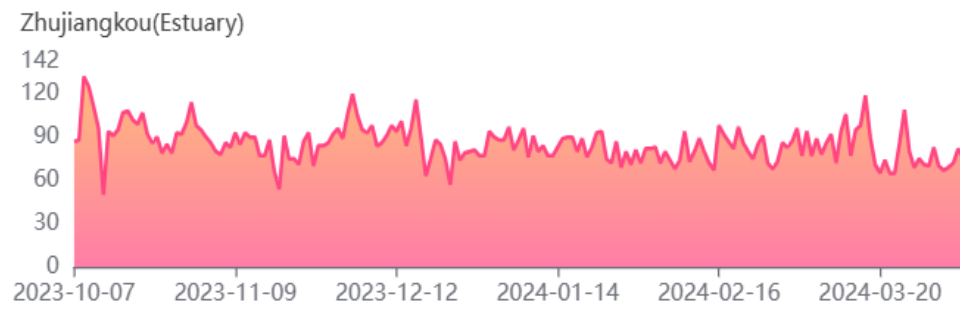
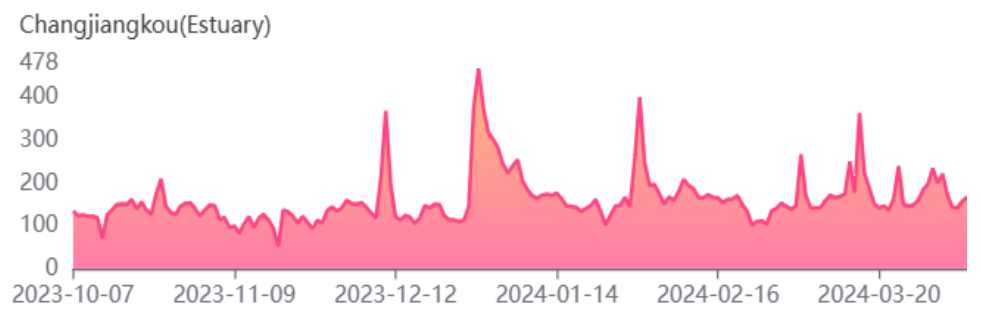
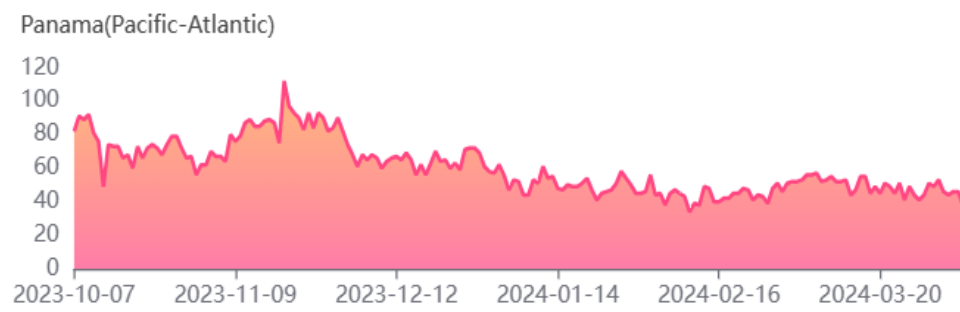
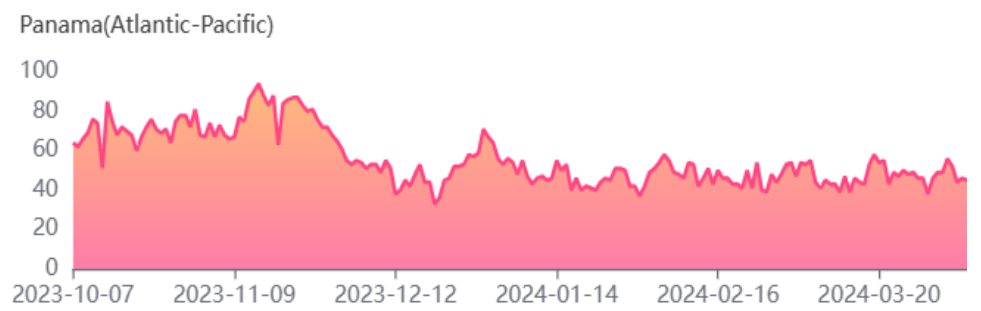
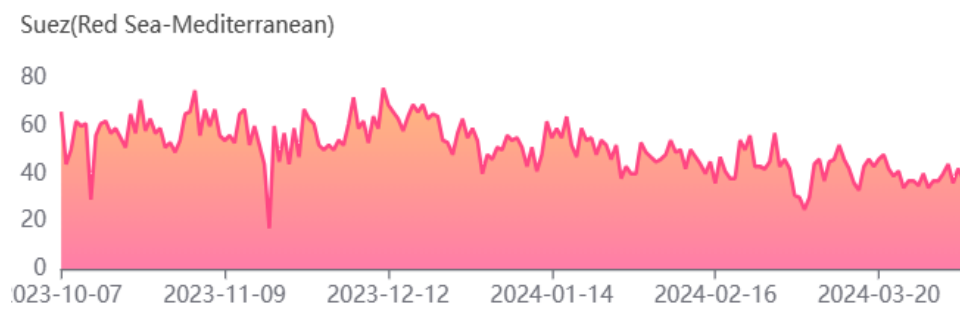
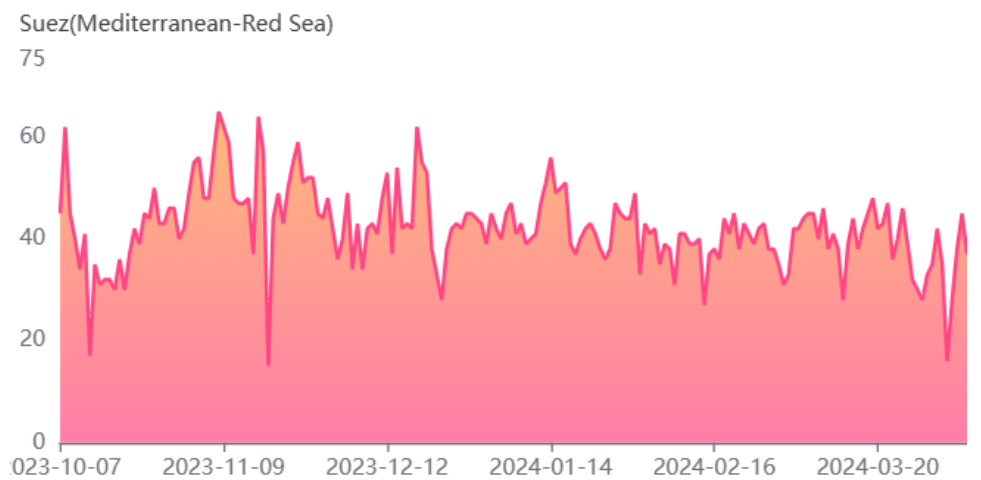
本报告数据截止时间为2024年4月7日北京时间17点；所有数据和或观点仅供参考，在任何情况下本公司及其员工不承担任何风险。The data deadline for this report is Beijing time 17 hours on Apr 7 of 2024; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

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	37	1176	16	-59
Miss.Riv.	2	99	2	17
CJK	168	5292	-20	843
Pa.Atlan.	45	1367	17	10
Colum.Riv.	7	169	7	-1
Suez.Med.	37	1093	-7	-56
Pa.Pac.	38	1378	-10	6
ZJK	79	2341	-45	-78

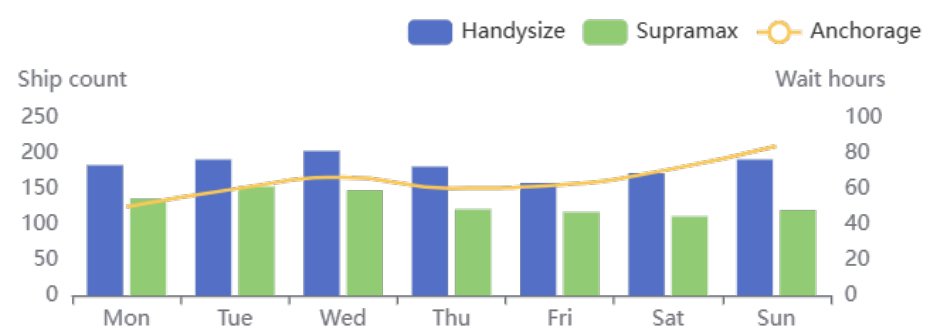


(P.N.-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

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

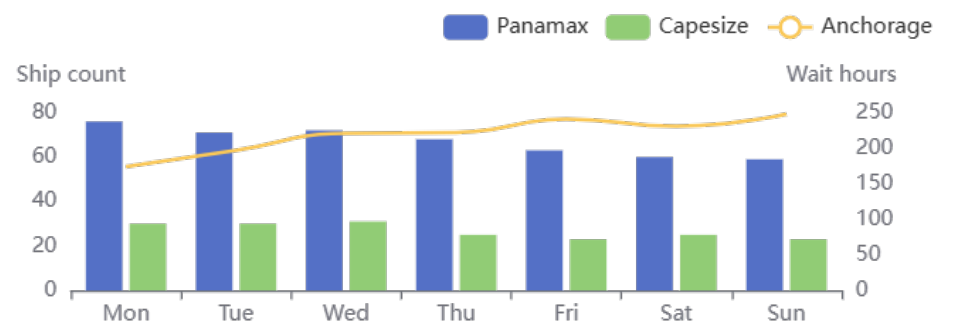
Type	M	T	W	Th	F	Sat	Sun
HDY	183	191	203	181	158	172	191
SMX	136	153	148	121	117	111	120
WT.h.	49.8	59.9	66.5	60.3	62.2	70.7	84



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

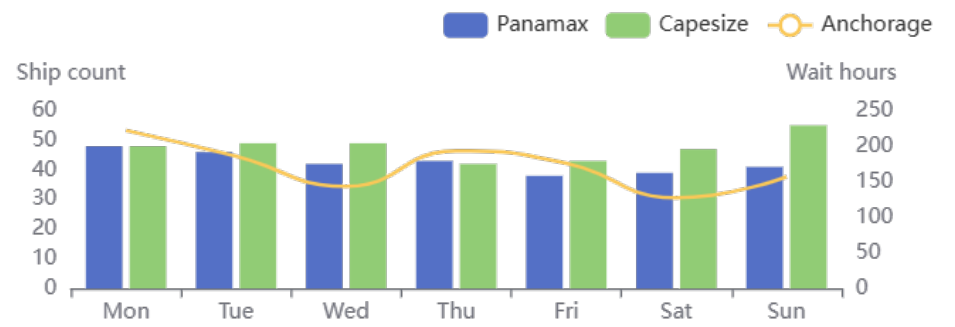
Type	M	T	W	Th	F	Sat	Sun
Pan.	76	71	72	68	63	60	59
Cap	30	30	31	25	23	25	23
WT.h.	173.9	197.1	221.1	222.1	240.8	230.9	248



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

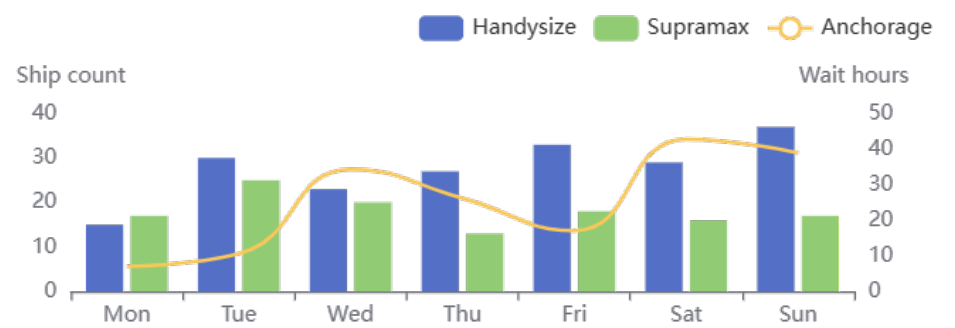
Type	M	T	W	Th	F	Sat	Sun
Pan.	48	46	42	43	38	39	41
Cap	48	49	49	42	43	47	55
WT.h.	222.3	185.9	143.4	193.4	176	127.4	157



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

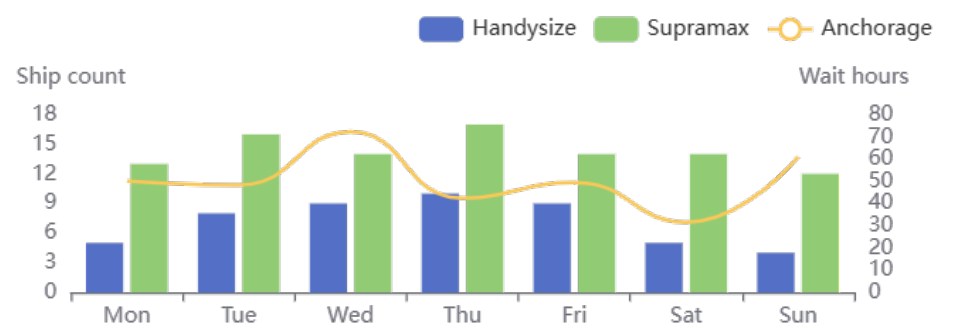
Type	M	T	W	Th	F	Sat	Sun
HDY	15	30	23	27	33	29	37
SMX	17	25	20	13	18	16	17
WT.h.	7.1	10.6	34.3	26.2	17.1	42.8	39



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

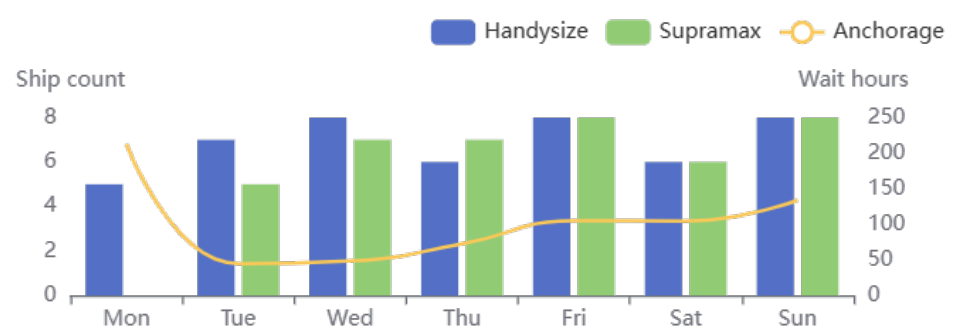
Type	M	T	W	Th	F	Sat	Sun
HDY	5	8	9	10	9	5	4
SMX	13	16	14	17	14	14	12
WT.h.	50.05	48.3	72.3	42.4	49.5	31.6	61



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

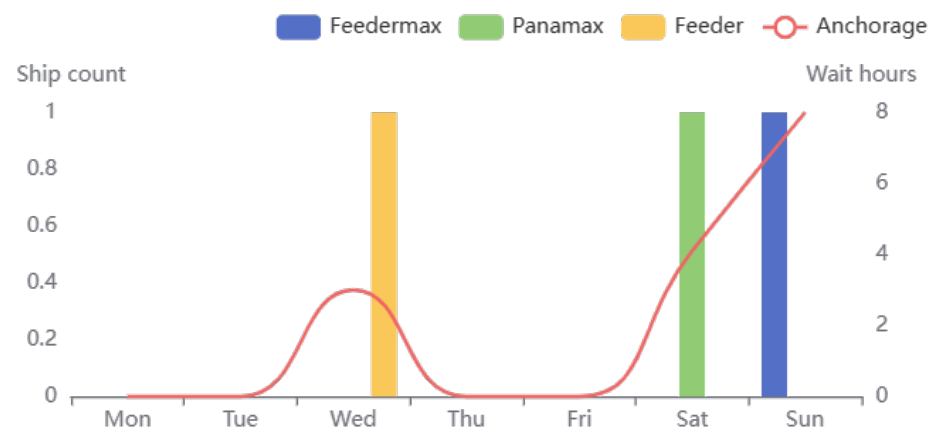
Type	M	T	W	Th	F	Sat	Sun
HDY	5	7	8	6	8	6	8
SMX	0	5	7	7	8	6	8
WT.h.	212.9	44.7	48.4	72.4	105.05	104.6	134



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

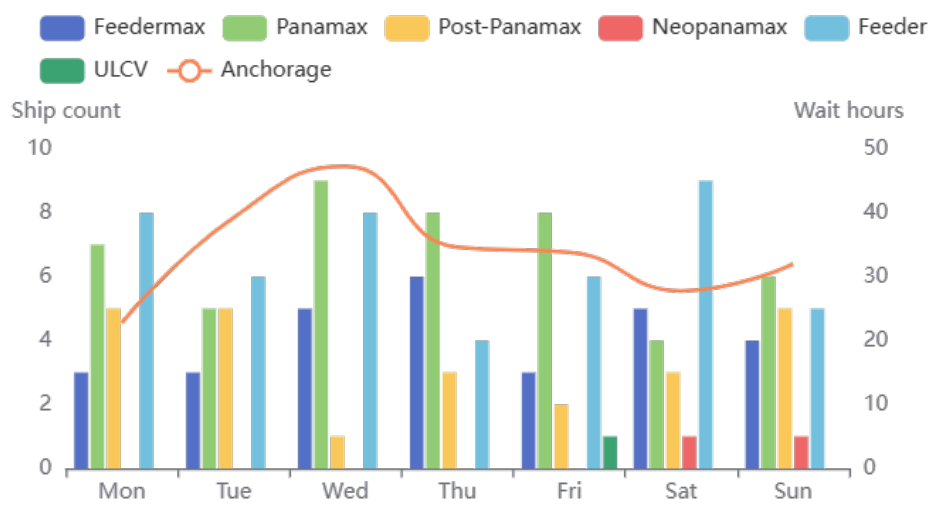
Type	M	T	W	Th	F	Sat	Sun
F.ma.	0	0	0	0	0	0	1
Pan.	0	0	0	0	0	1	0
PPx	0	0	0	0	0	0	0
NPx	0	0	0	0	0	0	0
Fd	0	0	1	0	0	0	0
WT.h.	0.0	0.0	3	0.0	0.0	4.1	8
Ulcw	0	0	0	0	0	0	0



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

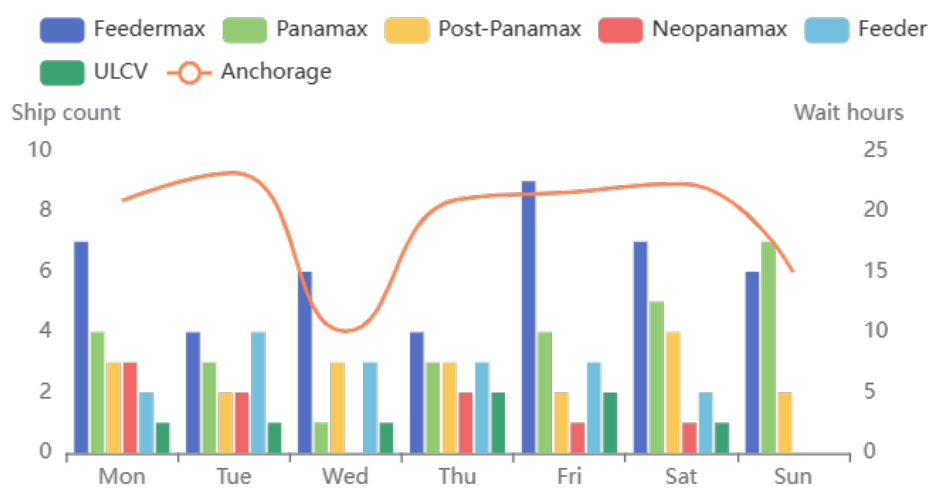
Type	M	T	W	Th	F	Sat	Sun
F.ma.	3	3	5	6	3	5	4
Pan.	7	5	9	8	8	4	6
PPx	5	5	1	3	2	3	5
NPx	0	0	0	0	0	1	1
Fd	8	6	8	4	6	9	5
Ulcw	0	0	0	0	1	0	0
WT.h.	22.8	39.3	47.3	34.6	33.85	27.8	32



最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

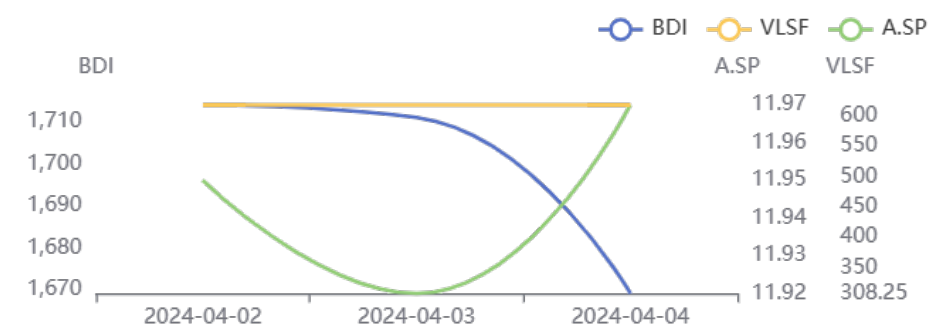
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

Type	M	T	W	Th	F	Sat	Sun
F.ma.	7	4	6	4	9	7	6
Pan.	4	3	1	3	4	5	7
PPx	3	2	3	3	2	4	2
NPx	3	2	0	2	1	1	0
Fd	2	4	3	3	3	2	0
Ulcw	1	1	1	2	2	1	0
WT.h.	20.9	23.2	10.1	21	21.6	22.3	15



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

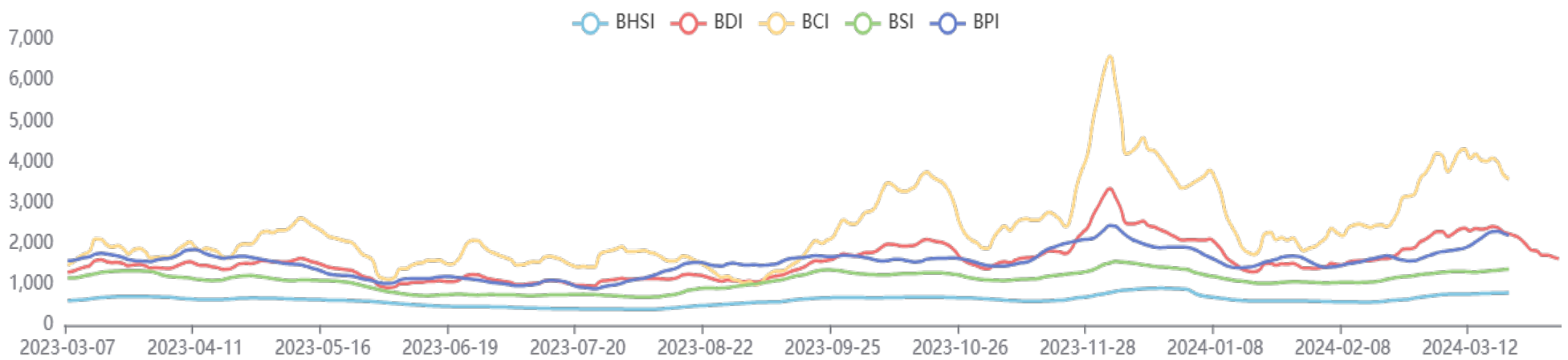
Type	M	T	W	Th	F	Sat	Sun
BDI	1816	1772	1733	1695			
VLSF	616.50	616.50	616.50	616.50			
A.SP	12.02	11.95	11.92	11.97	12.04	12.06	



第三部分 航运市场 SHIPPING MARKET

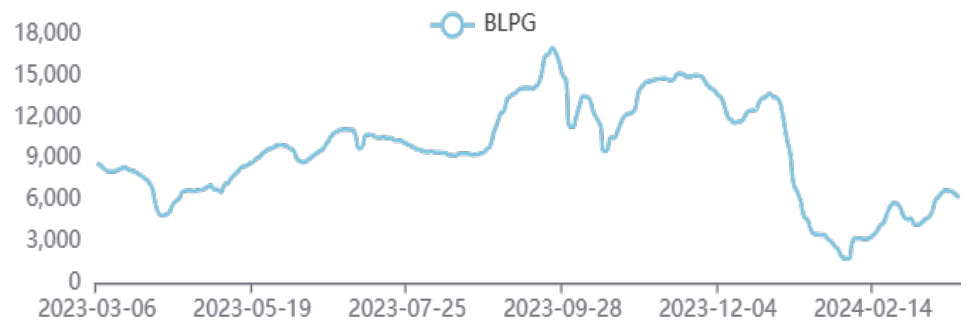
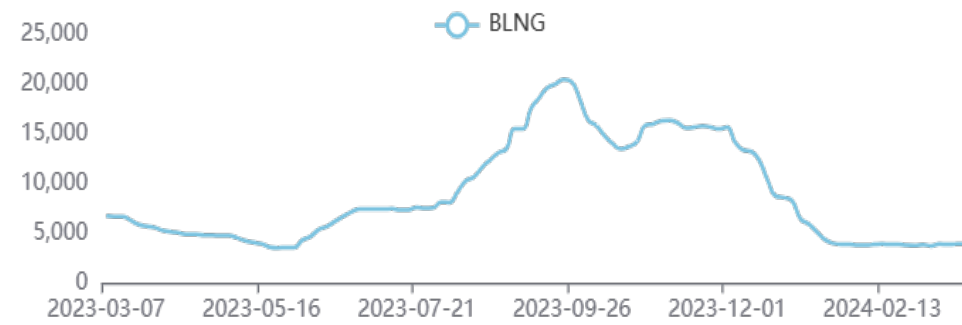
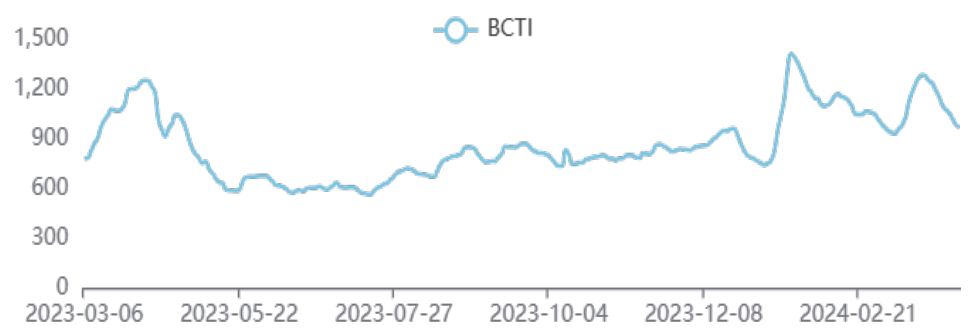
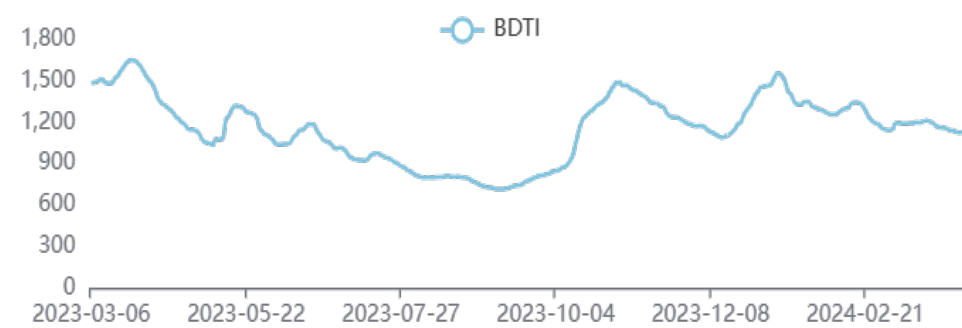
波罗的海干散货指数Baltic Dry Index

Type	PI	WoW	W%	M%	y%
BDI	795	18.0	2.32	28.64	12.77
BCI	1628	-193.0	-10.6	-30.58	6.75
BPI	1994	79.0	4.13	5.22	-17.87
BSI	735	-37.0	-4.79	N/A	Infinity
BHSI	5382	192.0	3.7	N/A	Infinity



能源运价指数Energy Shipping Index

Type	PI	WoW	W%	M%	y%
BDTI	1261	-70.0	-5.26	N/A	Infinity
BCTI	1122	-15.0	-1.32	-5.4	-14.94
BLNG	2073	18.0	0.88	N/A	Infinity
BLPG	2464	-218.0	-8.13	N/A	Infinity



第四部分 运力分布 SUPPLY DISTRIBUTION

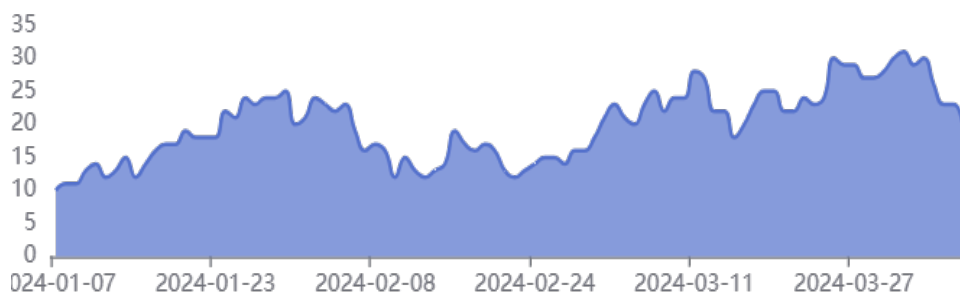


好望角型散货船 Capesize

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.

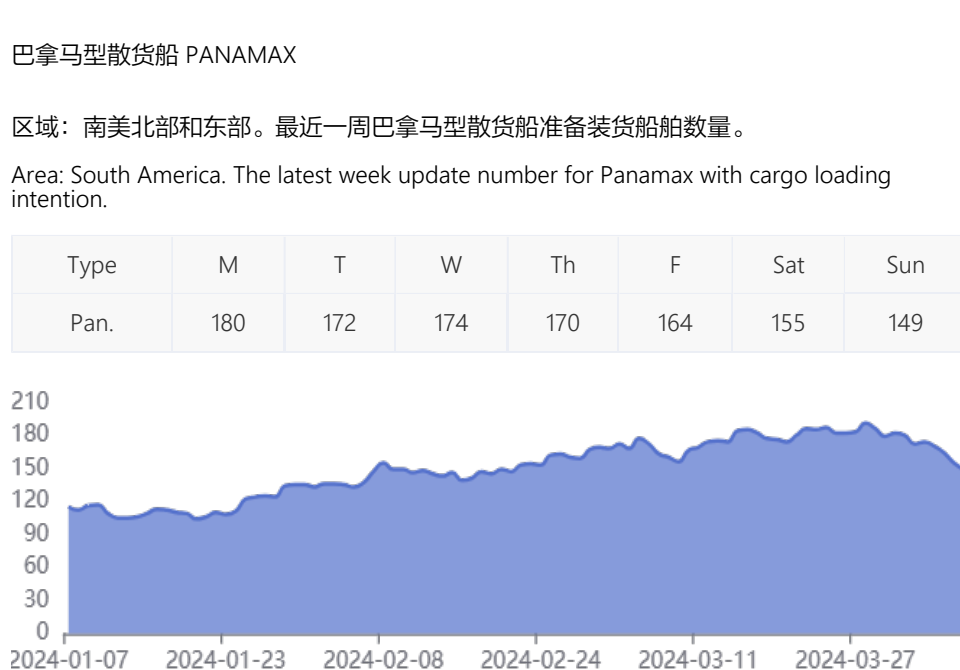
Type	M	T	W	Th	F	Sat	Sun
Cape	31	29	30	26	23	23	19



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.

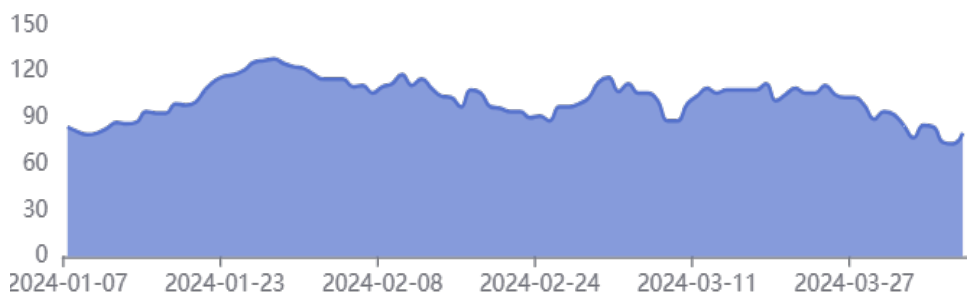
Type	M	T	W	Th	F	Sat	Sun
Cape	27	26	29	31	28	28	24



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.

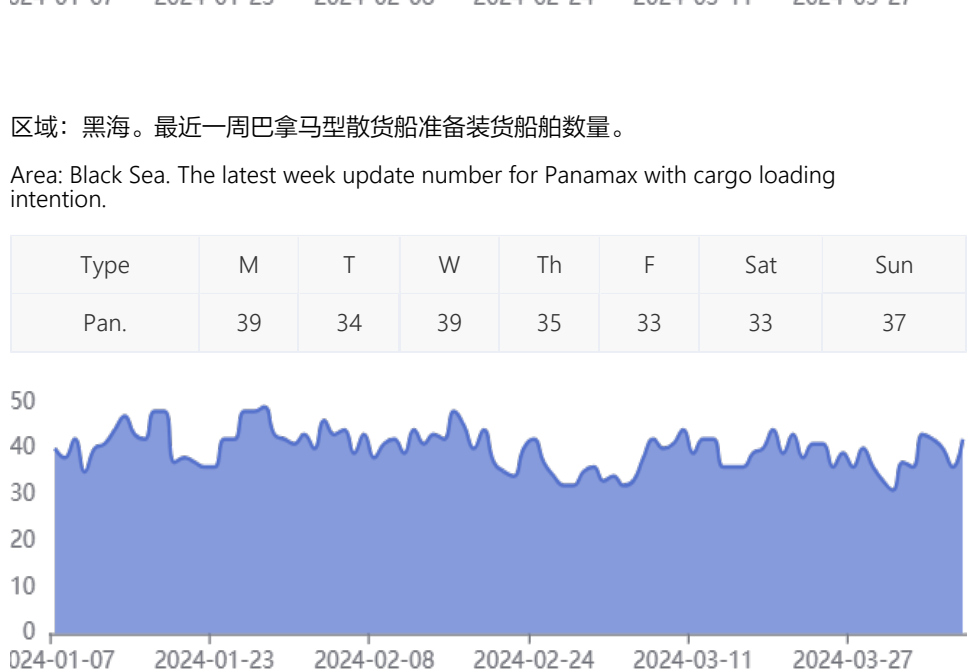
Type	M	T	W	Th	F	Sat	Sun
Cape	85	77	85	84	74	73	80



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.	39	34	39	35	33	33	37

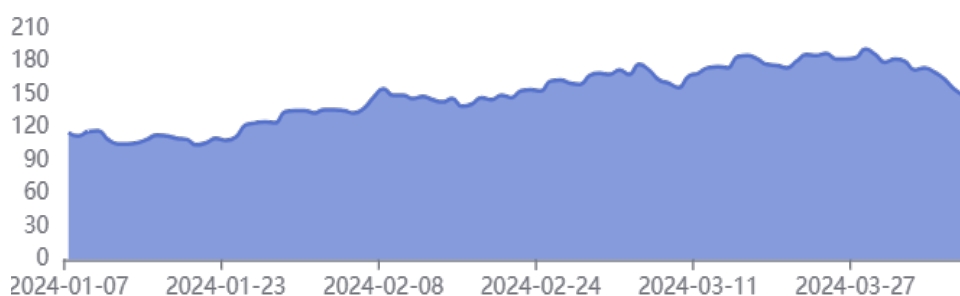


巴拿马型散货船 PANAMAX

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.

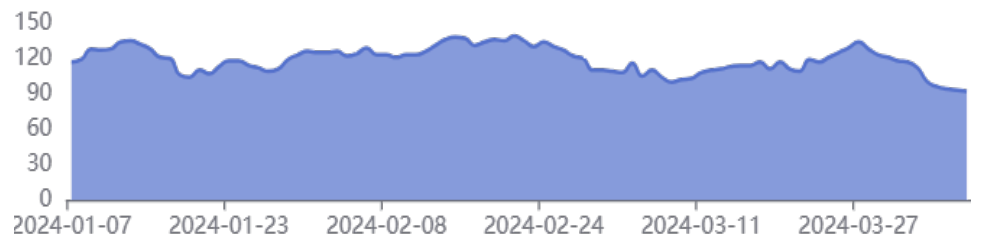
Type	M	T	W	Th	F	Sat	Sun
Pan.	180	172	174	170	164	155	149



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.	117	112	100	96	94	93	92

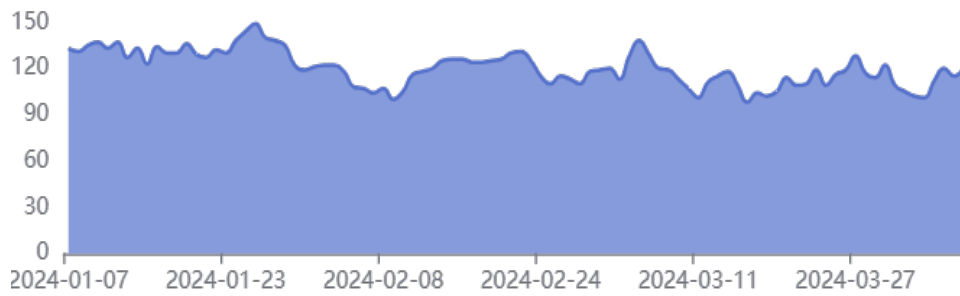


超大灵便型散货 SUPRAMAX

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.

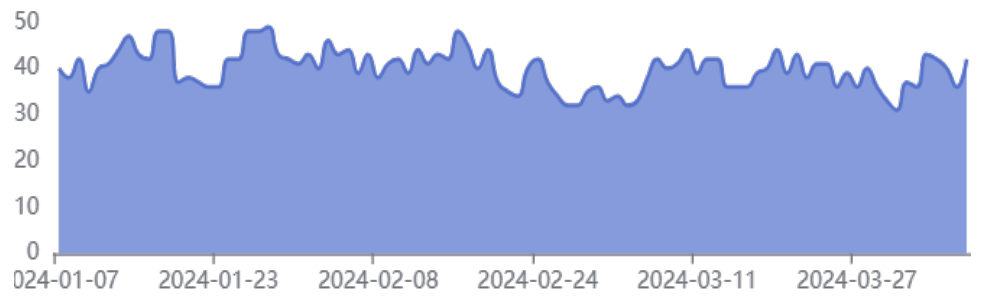
Type	M	T	W	Th	F	Sat	Sun
SMX	105	102	101	112	120	115	120



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.

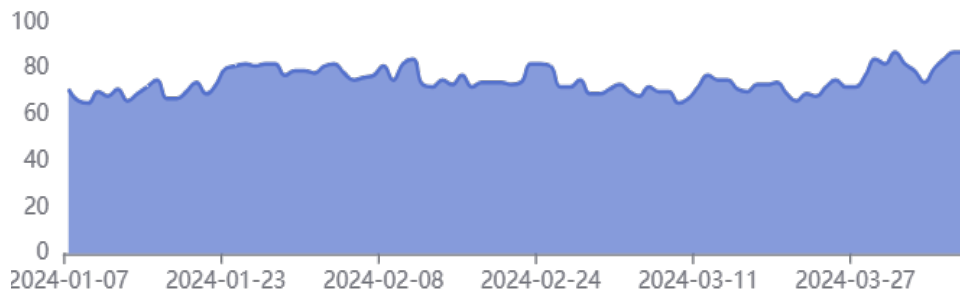
Type	M	T	W	Th	F	Sat	Sun
SMX	37	36	43	42	40	36	42



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.

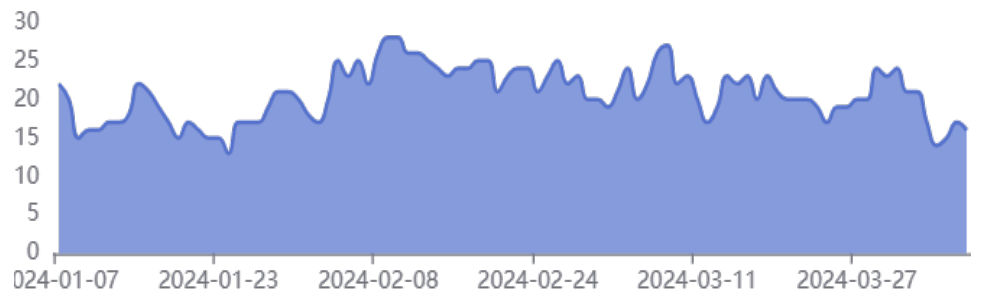
Type	M	T	W	Th	F	Sat	Sun
SMX	21	21	17	14	15	17	16



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.

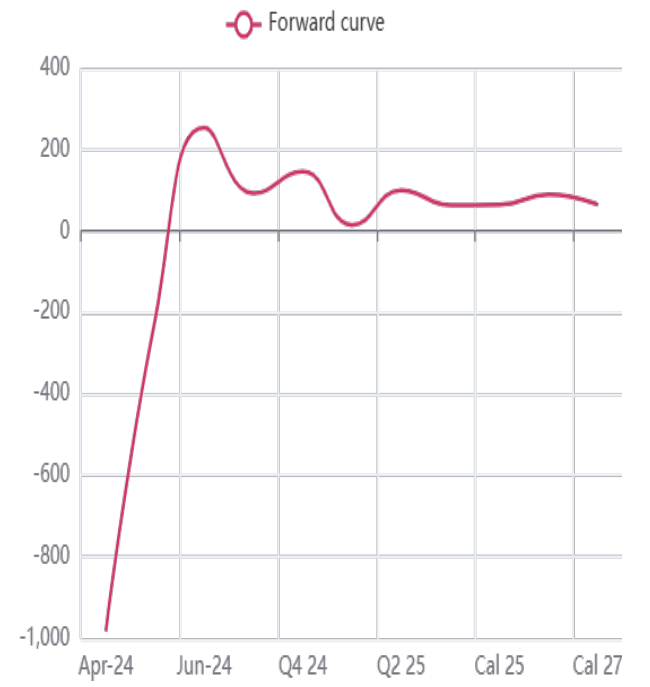
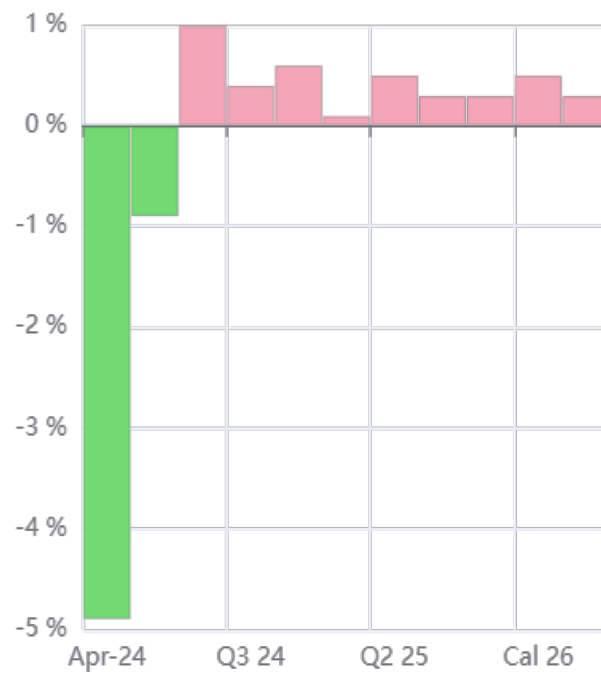
Type	M	T	W	Th	F	Sat	Sun
SMX	82	79	74	80	84	87	87



第五部分 远期运价协议 FFA

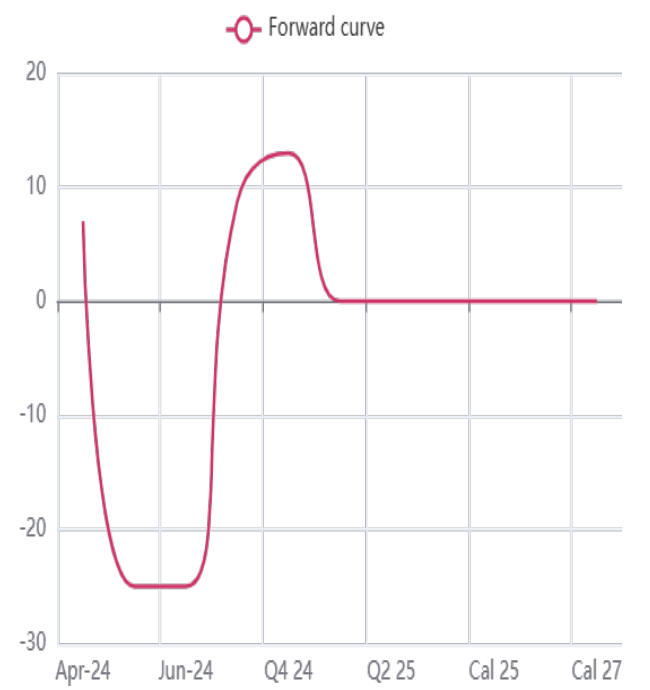
好望角型散货船Capesize

STC	\$/day	WoW	
Apr-24	19,179.00	-982.0	-4.9 %
May-24	24,693.00	-218.0	-0.9 %
Jun-24	26,843.00	254.0	1.0 %
Q3 24	26,026.00	92.33	0.4 %
Q4 24	25,600.00	146.0	0.6 %
Q1 25	15,279.00	15.0	0.1 %
Q2 25	19,771.00	100.0	0.5 %
Q3 25	22,357.00	64.0	0.3 %
Cal 25	19,912.50	64.5	0.3 %
Cal 26	19,111.00	90.0	0.5 %
Cal 27	18,861.00	65.0	0.3 %



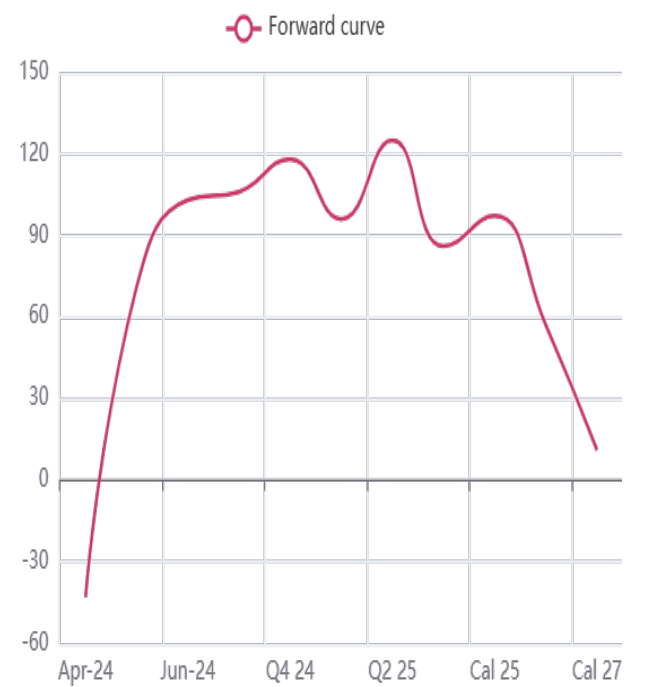
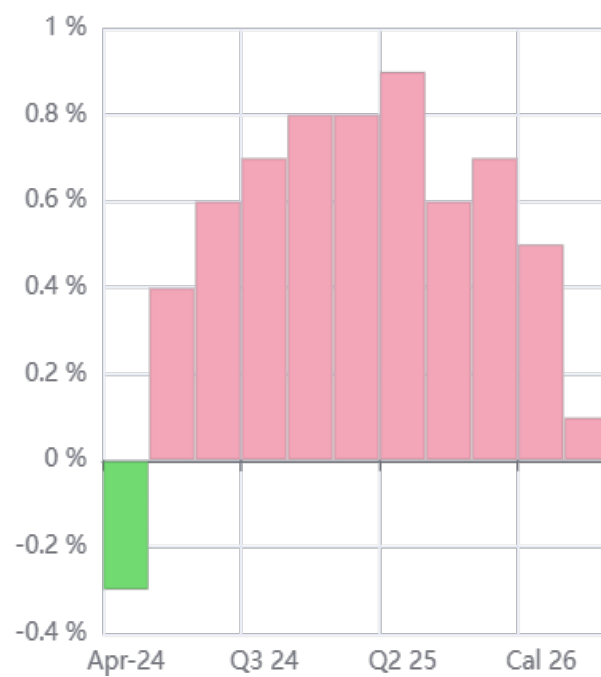
灵便型散货船Handysize

7TC	\$/day	WoW	
Apr-24	13,213.00	7.0	0.1 %
May-24	13,200.00	-25.0	-0.2 %
Jun-24	13,050.00	-25.0	-0.2 %
Q3 24	13,008.67	8.67	0.1 %
Q4 24	12,863.00	13.0	0.1 %
Q1 25	11,063.00	0.0	0.0 %
Q2 25	11,675.00	0.0	0.0 %
Q3 25	12,431.00	0.0	0.0 %
Cal 25	11,900.00	0.0	0.0 %
Cal 26	11,638.00	0.0	0.0 %
Cal 27	11,563.00	0.0	0.0 %



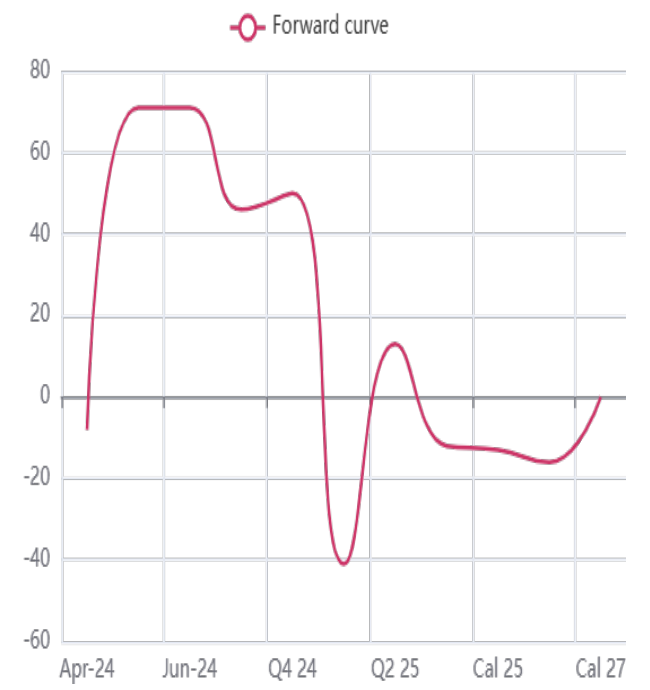
巴拿马型散货船Panamax

4TC	\$/day	WoW	
Apr-24	14,532.00	-43.0	-0.3 %
May-24	15,971.00	71.0	0.4 %
Jun-24	16,039.00	103.0	0.6 %
Q3 24	15,831.00	106.0	0.7 %
Q4 24	14,961.00	118.0	0.8 %
Q1 25	12,507.00	96.0	0.8 %
Q2 25	13,825.00	125.0	0.9 %
Q3 25	13,336.00	86.0	0.6 %
Cal 25	13,221.50	97.25	0.7 %
Cal 26	12,493.00	57.0	0.5 %
Cal 27	12,093.00	11.0	0.1 %



超大灵便型散货船Supramax

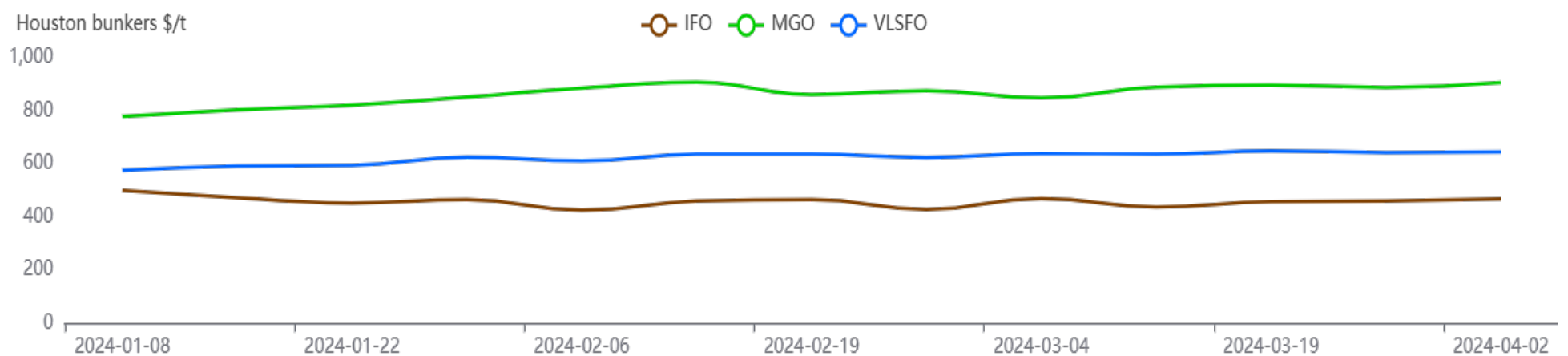
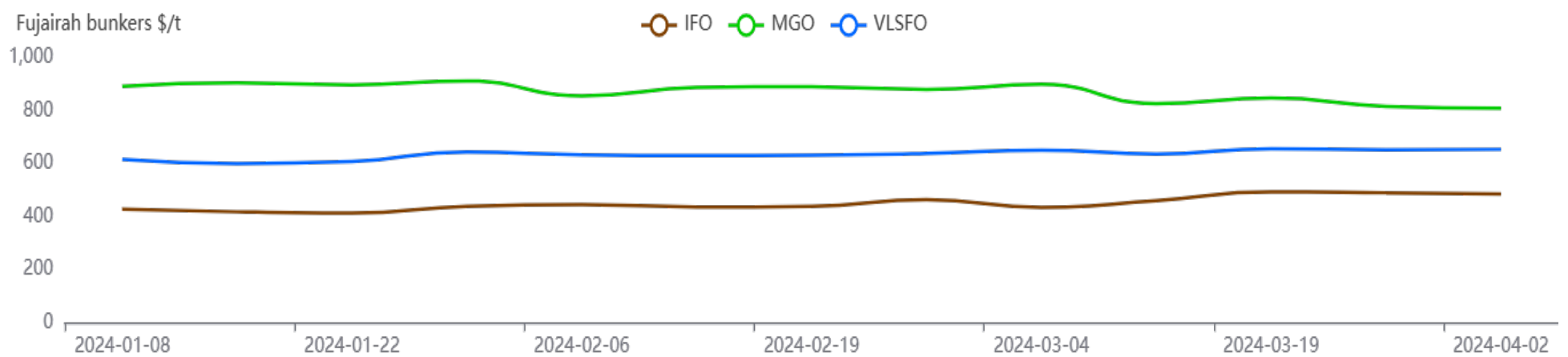
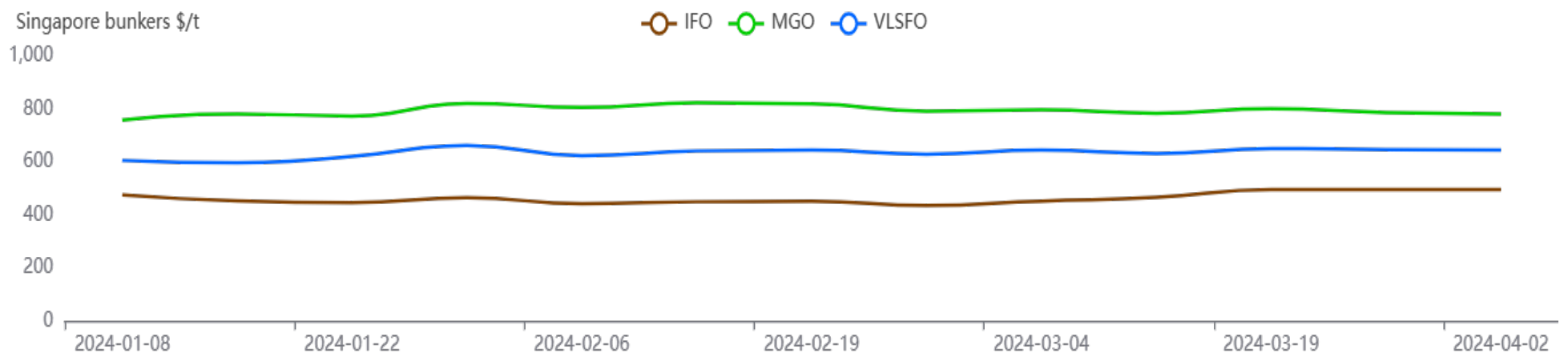
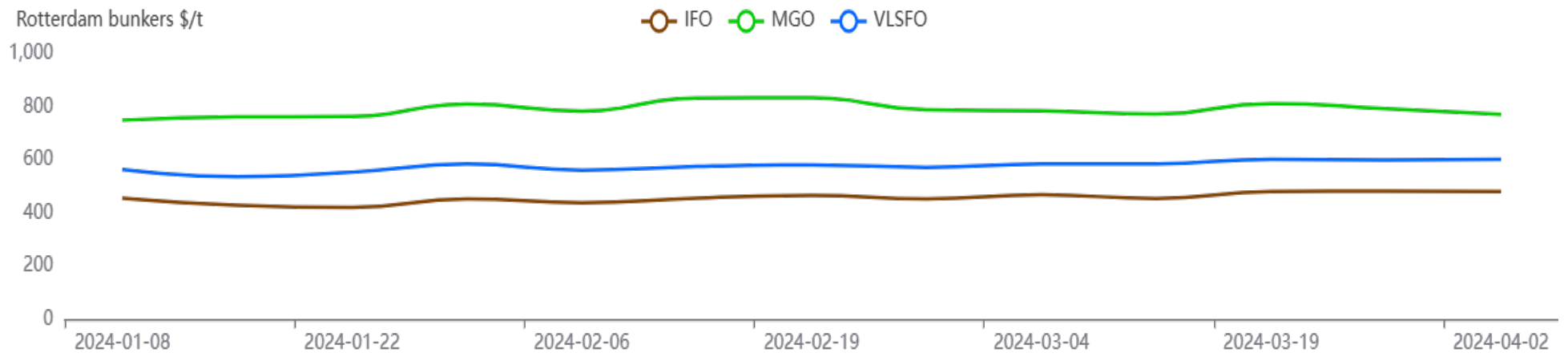
10TC	\$/day	WoW	
Apr-24	14,167.00	-8.0	-0.1 %
May-24	14,488.00	71.0	0.5 %
Jun-24	14,296.00	71.0	0.5 %
Q3 24	14,321.00	46.0	0.3 %
Q4 24	14,142.00	50.0	0.4 %
Q1 25	11,688.00	-41.0	-0.3 %
Q2 25	12,838.00	13.0	0.1 %
Q3 25	13,253.00	-12.0	-0.1 %
12,758.00	Cal 25	-13.0	-0.1 %
Cal 26	12,113.00	-16.0	-0.1 %
Cal 27	11,913.00	0.0	0.0 %



第六部分 燃油价格 BUNKER PRICE

MP	LO	HO	MO	SP	WoW	W%	M%
zhoushan	632.0	493.0	814.0	139.0	-2.5	-1.77	-23.2
Singapore	645.5	496.5	781.5	149.0	-2.0	-1.32	-23.0
Rotterdam	602.5	481.5	772.0	121.0	4.0	3.42	4.31
Fujairah	654.0	485.5	809.5	168.5	6.0	3.69	-21.99
Houston	645.0	468.5	906.5	176.5	-6.0	-3.29	4.13

(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		198.0	-1.0	-0.5	-2.46	-22.89
Maize		195.0	-3.0	-1.52	2.63	-34.33
Soybeans		223.0	-2.0	-0.89	4.69	-19.7
Rice		250.0	-1.0	-0.4	-2.34	27.52
Barley		206.0	-1.0	-0.48	0.98	-25.0
Energy		Index	+/-	Weekly	Monthly	YTD
Crude Oil	USD/Bbl	82.03	0.0	0.0	2.37	17.81
Brent	USD/Bbl	86.78	0.0	0.0	3.46	15.29
Natural Gas	USD/MMBtu	1.82	0.0	0.0	-3.19	-13.33
Gasoline	USD/Gal	2.75	0.0	0.0	5.36	6.59
Heating Oil	USD/Gal	2.67	0.0	0.0	-1.11	-1.11
Ethanol	USD/Gal	1.59	0.0	0.0	7.43	-28.7
Naphtha	USD/T	711.05	0.0	0.0	3.37	6.11
Propane	USD/Gal	0.82	0.0	0.0	-4.65	3.8
Uranium	USD/Lbs	85.0	0.0	0.0	-10.53	68.82
Methanol	CNY/T	2521.0	0.0	0.0	-0.94	1.04
TTF Gas	EUR/MWh	27.85	0.0	0.0	11.89	-34.41
UK Gas	GBP/thm	71.6	0.0	0.0	15.3	-31.67
Industrial		Index	+/-	Weekly	Monthly	YTD
Copper	USD/Lbs	4.0	0.0	0.0	3.09	-1.48
Coal	USD/T	128.95	0.0	0.0	-2.31	-26.48
Steel	CNY/T	3549.0	0.0	0.0	-4.11	-13.54
Iron Ore	USD/T	110.5	0.0	0.0	-5.96	-9.8
Aluminum	USD/T	2325.0	0.0	0.0	4.24	-0.49
Iron Ore Fe 62%	USD/T	2325.0	0.0	0.0	4.24	-0.49
Metals		Index	+/-	Weekly	Monthly	YTD
Gold	USD/t.oz	2180.2	0.0	0.0	4.61	10.8
Silver	USD/t.oz	24.6	0.0	0.0	6.49	6.86
Platium	USD/t.oz	903.3	0.0	0.0	1.45	-6.52
Currencies		Index	+/-	Weekly	Monthly	YTD
EUR/USD		1.08	0.0	0.0	0.0	0.0
USD/CNY		7.25	0.0	0.0	0.55	5.38

第八部分 本周话题 WEEKLY TOPIC



2023年LNG运输市场

根据HiFleet数据统计，2023年全球LNG海运贸易量约为4亿吨，共计装船6451艘次（仅统计不同国家之间通过液化天然气运输船/LNG Carrier完成的贸易）；近几年碳达峰、碳中和环保政策以及俄乌冲突导致LNG运输船表现强劲，同时LNG海运贸易格局也发生了一些变化。

2023年，美国LNG发运量约为8245万吨，同比增加19%，抢夺了大量的欧洲市场份额且成为最大的LNG出口国。由于俄乌战争的爆发，欧盟对俄罗斯采取经济制裁，欧洲国家不得不寻找新的气源，大量采购美国LNG以替代俄罗斯的管道气。2023年美国LNG主要出口至西欧，荷兰从美国进口的LNG飙升至1079万吨，同比增加71%；德国也开始从美国进口LNG，2023年6月，德国政府全资拥有的欧洲安全能源公司（Securing Energy for Europe）与美国液化天然气供应商Venture Global LNG签署了一项为期20年的长期协议，将每年从Venture Global LNG进口225万吨液化天然气，以进一步取代俄罗斯天然气。2023年澳大利亚LNG发运量为7643万吨，较2022年减少了2%；澳大利亚LNG主要发往亚太区域，其中发往日本、中国、韩国的LNG占澳大利亚年度发运总量的88%。2023年，卡塔尔的Ras Laffan仍保持全球LNG第一大装港的地位，发运量约为7550万吨，较上一年略微减少；卡塔尔LNG的出口市场集中在亚洲地区，比如中国、印度、韩国、巴基斯坦。随着卡塔尔石油公司和中国石化的27年长期协议的实施，中国继续保持为卡塔尔LNG最大的贸易伙伴。

远东地区依然是全球LNG进口主力，中、日、韩三国占据了全球LNG进口总量的44%。据HiFleet统计，2023年中国LNG进口量为6922万吨，较2022年增加596万吨，增幅超9%；中国LNG进口来源较多样化，但其中34%来自澳大利亚，约2338万吨；从卡塔尔进口1585万吨。

HiFleet数据显示，今年一季度，中国LNG进口1995万吨，与2023年同期激增21%；根据船舶AIS数据，HiFleet预计流向亚洲的LNG将继续增加，而前往欧洲的LNG将进一步减少。充足的供应和温和的冬季使亚洲LNG价格接近三年来的最低水平，使其与其他化石燃料相比在采购成本上具有很强优势。

According to HiFleet, the global LNG seaborne trade in 2023 is about 400 million tons, with a total of 6451 shipments (only the trade between different countries by LNG carriers). In recent years, the Carbon Dioxide Peaking and Carbon Neutrality environmental protection policy and the conflict between Russia and Ukraine have led to the strong performance of LNG carriers, while the pattern of LNG seaborne trade has also undergone some changes.

In 2023, the United States shipped about 82.45 million tons of LNG, an increase of 19% over the same period of last year, grabbing a large share of the European LNG market and becoming the largest LNG exporter in the world. Due to the outbreak of the war between Russia and Ukraine and the economic sanctions imposed by the European Union on Russia, European countries had to find new gas sources and purchase large quantities of LNG from the United States to replace Russian gas by pipeline. In 2023, American LNG was mainly exported to Western Europe. Holland imported 10.79 million tons of LNG from the United States, an increase of 71% over the same period last year. Germany also started to import LNG from the United States, and in June 2023, the German government-owned European Security Energy Company signed a 20-year long-term agreement with the U.S. LNG supplier Venture Global LNG. It will import 2.25 million tons of liquefied natural gas annually from Venture Global LNG to further replace Russian natural gas. Australia's LNG shipment volume in 2023 is 76.43 million tons, 2% less than that in 2022; Australia's LNG is mainly shipped to the Asia-Pacific region, of which to Japan, China and South Korea accounts for 88% of Australia's total annual shipment volume. In 2023, Ras Laffan of Qatar still maintained its position as the largest LNG loading port in the world, with a shipment volume of about 75.5 million tons, a slight decrease compared with the previous year. The export market of Qatar LNG is concentrated in Asia, such as China, India, South Korea and Pakistan. With the implementation of the 27-year long-term agreement between Qatar Petroleum and Sinopec, China continues to be the largest trading partner of Qatar LNG.

The Far East is still the main of LNG imports in the world, with China, Japan and South Korea accounting for 44% of the total global LNG imports. According to HiFleet, China's LNG import in 2023 is 69.22 million tons, 5.96 million tons more than that in 2022, an increase of more than 9%; China's LNG import sources are diversified, but 34% of them come from Australia, about 23.38 million tons; and 15.85 million tons from the Qatar.

Data of HiFleet show that in the first quarter of this year, China imported 19.95 million tons of LNG, a surge of 21% compared with the same period in 2023. According to ship AIS, HiFleet predicts that LNG flows to Asia will continue to increase, while that to Europe will further decrease. Abundant supply and a mild winter have kept Asian LNG prices close to their lowest level in past three years, giving them a strong advantage over other fossil fuels in terms of purchase cost.