



2024年 第16周市场周报

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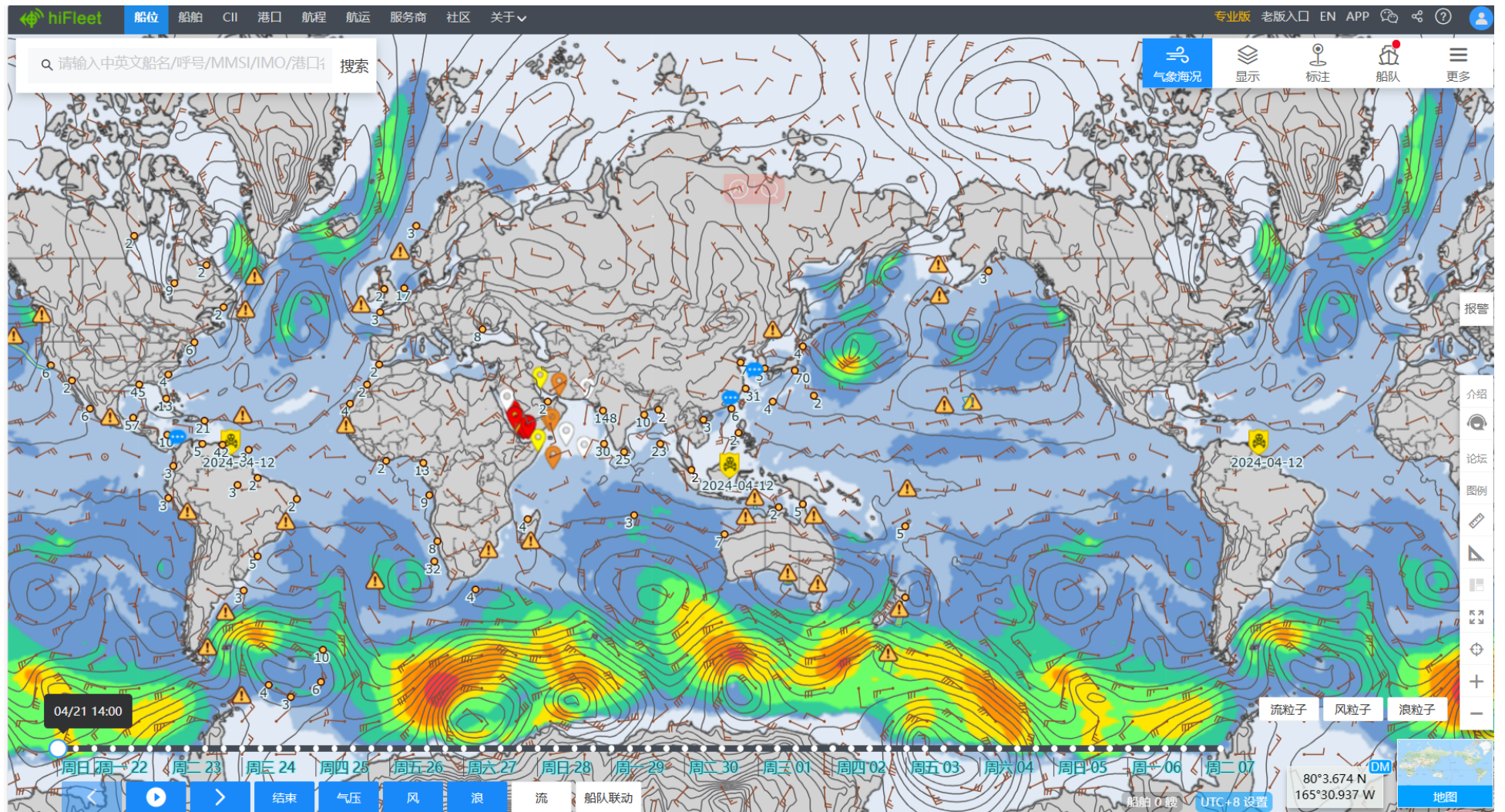
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最新商品价格 LATEST COMMODITIES PRICE

第八部分

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892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 892 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4-5级逐渐增强到5-6级，相关海域海浪将从1米轻浪到2米中浪；台湾海峡风力有时6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3-4级，有轻浪。大西洋和太平洋北部区域低压活动明显减少，海域海况逐步改善。The coming week the wind in Bohai Sea, Yellow Sea and China East Sea become strong from moderate to breeze with the seas from slight to moderate. The wind in the Taiwan Strait might reach strong breeze and the sea in the Taiwan Strait happens to experience rough. In most of the South China Sea the wind stays moderate with light sea. Low-pressure in the north of North Atlantic and Pacific Ocean become small, sea conditions are improving.

海盗事件 Piracy

4月12号，印度尼西亚巴厘巴岸锚地，四名海盗通过锚链登上一艘抛锚的成品油轮。他们闯入船首楼的仓库，带着船上的物资和财产逃走了。事件已经报告巴厘巴班港口控制中心。12.04.2024: 2125 UTC: Posn: 01:17.81S - 116:47.86E, Balikpapan Anchorage, Indonesia. An anchored product tanker was boarded by four perpetrators via the anchor chain. They broke into the forecandle store and escaped with ship's stores and properties. Incident reported to Balikpapan port control.

海上事件 Marine Incidents

伊朗当局4月18号报告称，中东海湾一艘倾覆油轮上的21名斯里兰卡船员获救。这艘船在离贾斯克港50公里处遇风暴沉没。Iranian authorities reported on April 18 that 21 Sri Lankan crew members from a capsized oil tanker in the Middle East Gulf had been rescued. The ship sank in a storm 50 kilometers from Port Jask.

其它 Others

没有 Nil

备注 Remark

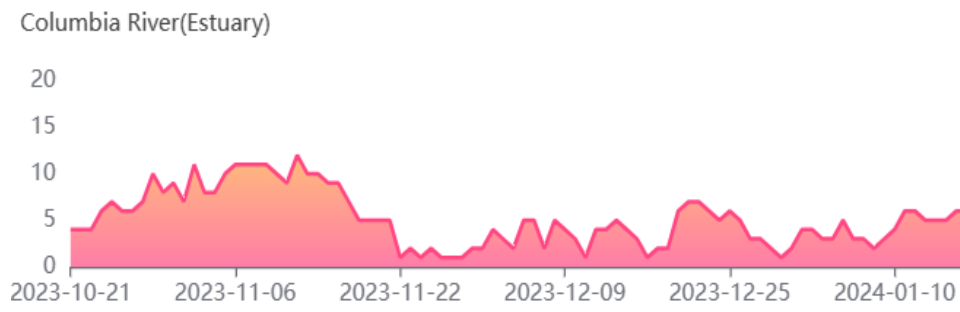
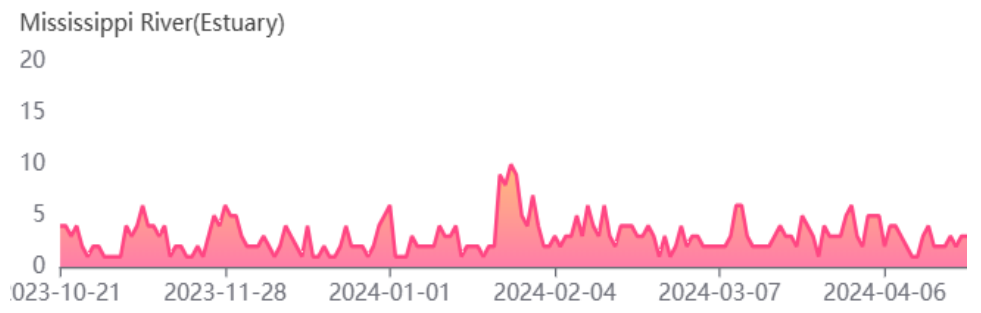
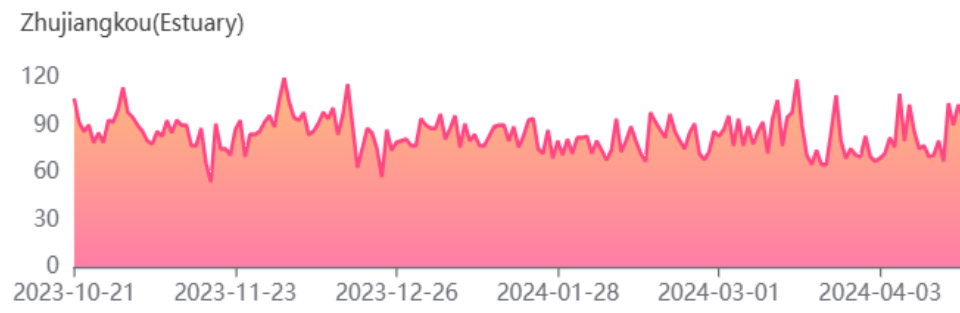
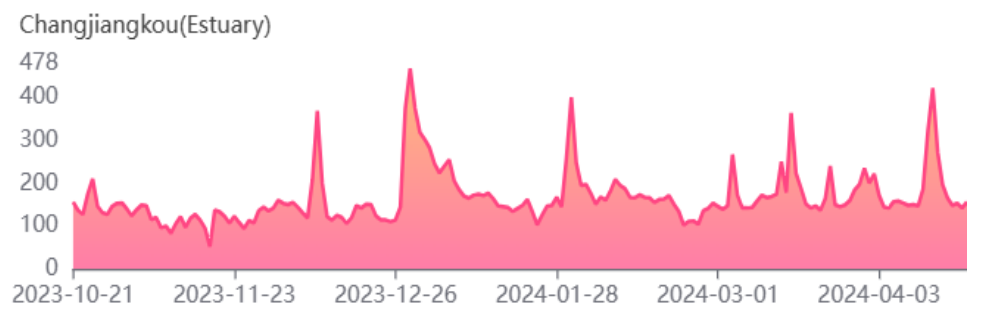
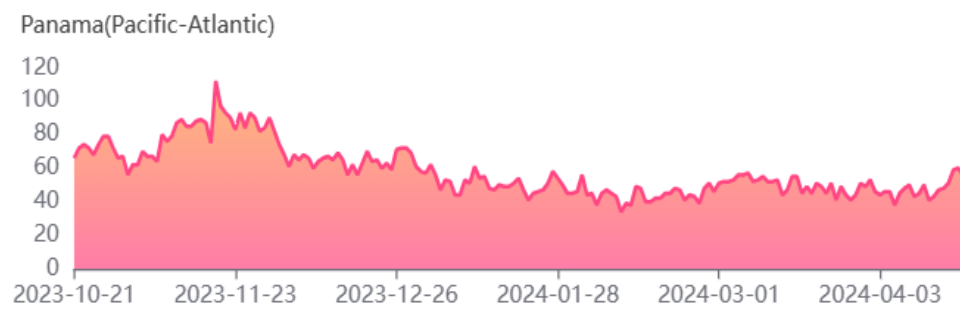
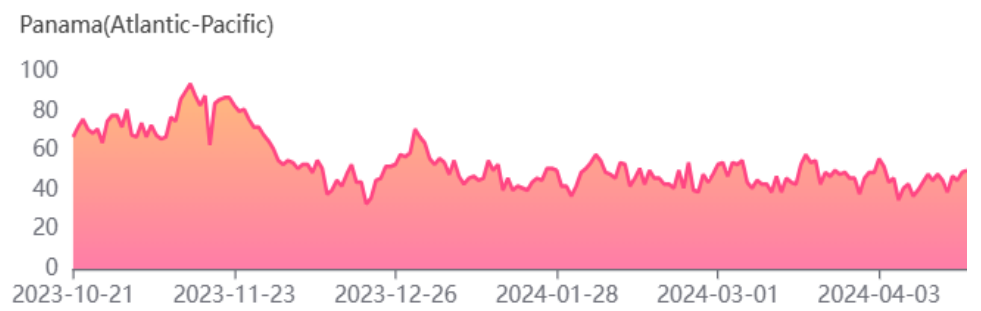
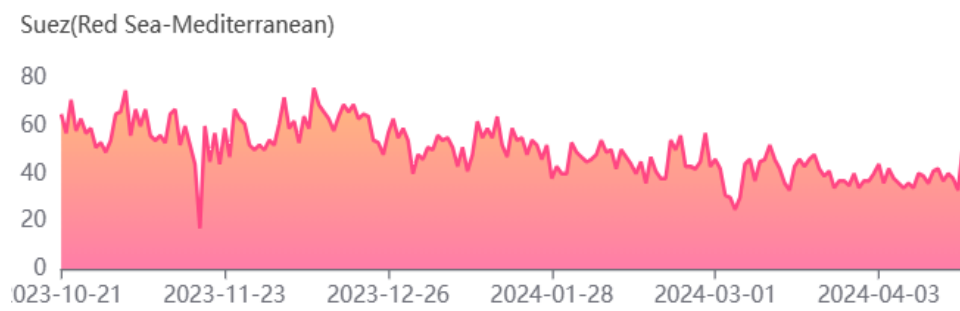
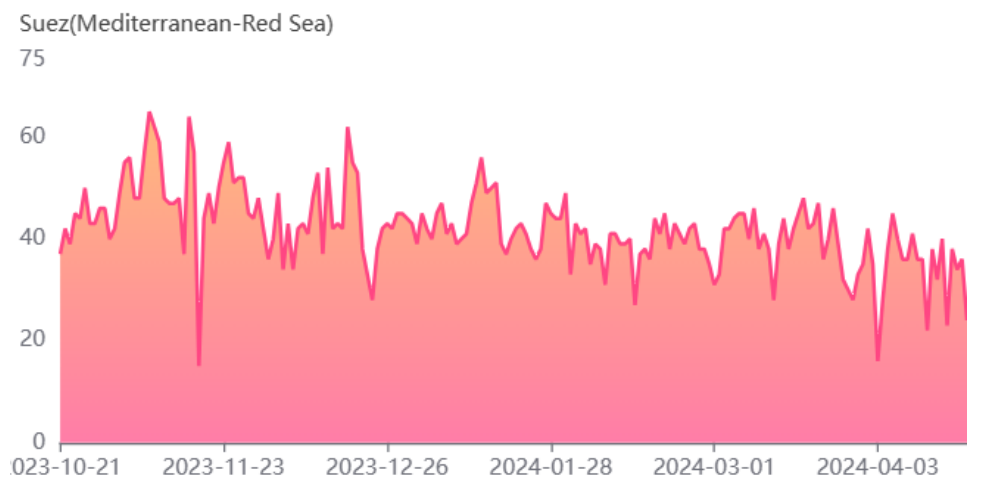
本报告数据截止时间为2024年4月21日北京时间17点；所有数据和或观点仅供参考，在任何情况下本公司及其员工不承担任何风险。The data deadline for this report is Beijing time 17 hours on Apr 21 of 2024; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

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	48	1118	35	-91
Miss.Riv.	3	89	-1	7
CJK	156	5417	-29	449
Pa.Atlan.	50	1322	35	-46
Colum.Riv.	5	166	1	-1
Suez.Med.	24	999	-20	-174
Pa.Pac.	57	1386	56	-71
ZJK	90	2380	28	-46

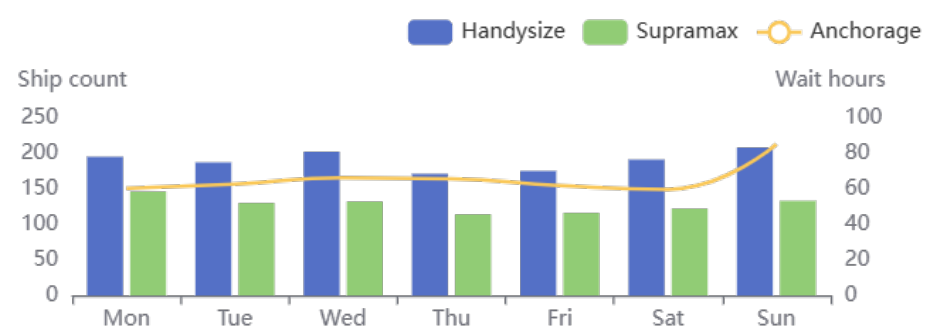


(P.N-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

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

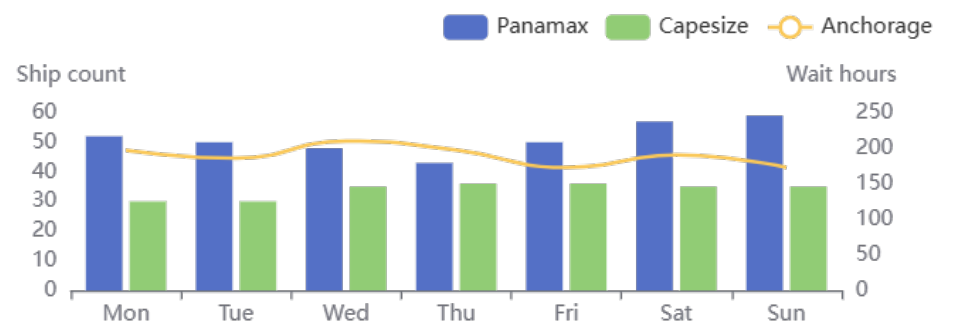
Type	M	T	W	Th	F	Sat	Sun
HDY	195	187	202	171	175	191	208
SMX	146	130	132	114	116	122	133
WT.h.	60.2	62.6	66.3	65.6	61.8	59.7	85



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

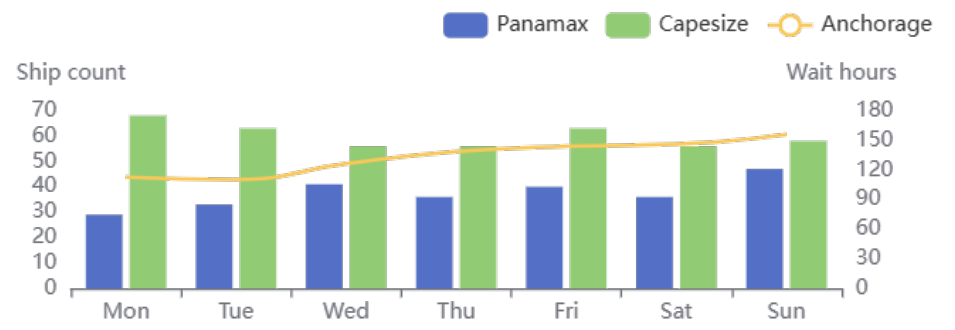
Type	M	T	W	Th	F	Sat	Sun
Pan.	52	50	48	43	50	57	59
Cap	30	30	35	36	36	35	35
WT.h.	196.8	186	210	197.3	172.8	190.3	173



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

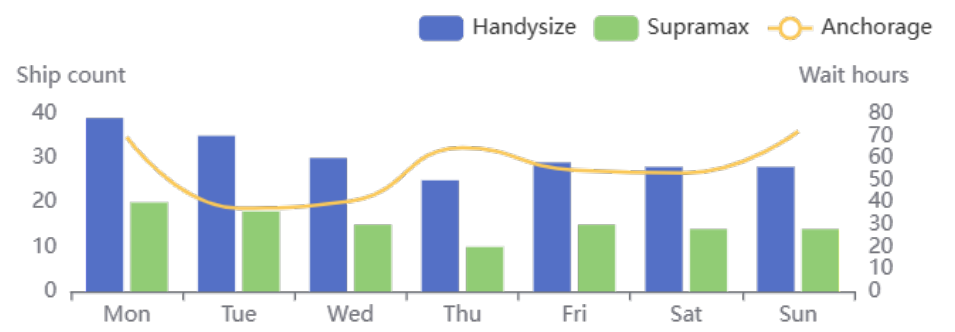
Type	M	T	W	Th	F	Sat	Sun
Pan.	29	33	41	36	40	36	47
Cap	68	63	56	56	63	56	58
WT.h.	112.6	110.2	126.3	138.5	143.9	146	156



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

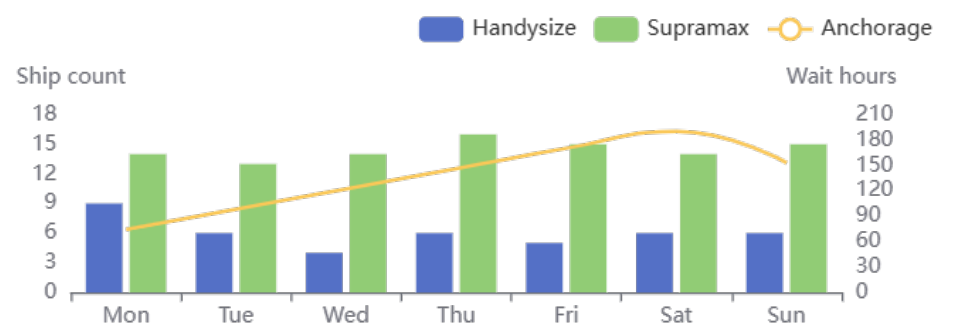
Type	M	T	W	Th	F	Sat	Sun
HDY	39	35	30	25	29	28	28
SMX	20	18	15	10	15	14	14
WT.h.	69.4	37.5	40.7	64.7	54.6	53.3	72



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

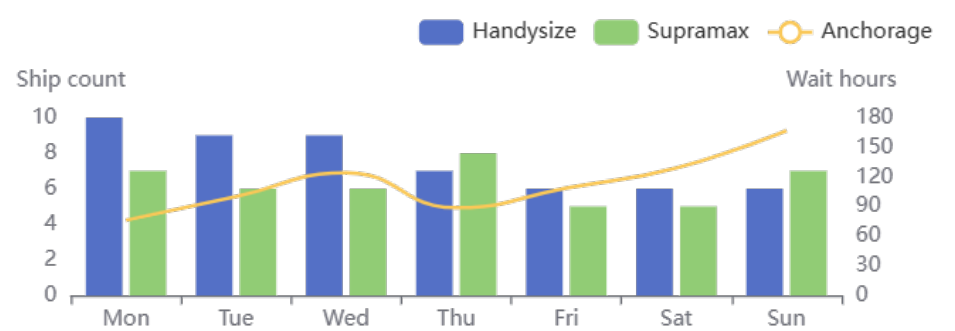
Type	M	T	W	Th	F	Sat	Sun
HDY	9	6	4	6	5	6	6
SMX	14	13	14	16	15	14	15
WT.h.	74.3	98.3	122.3	146.3	170.3	190.2	153



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

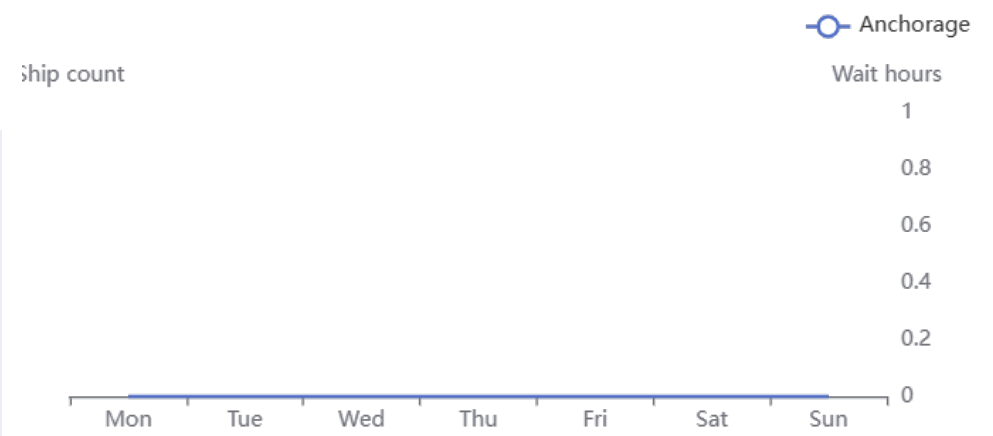
Type	M	T	W	Th	F	Sat	Sun
HDY	10	9	9	7	6	6	6
SMX	7	6	6	8	5	5	7
WT.h.	76.1	100.1	124.1	88.8	108.7	129.1	167



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

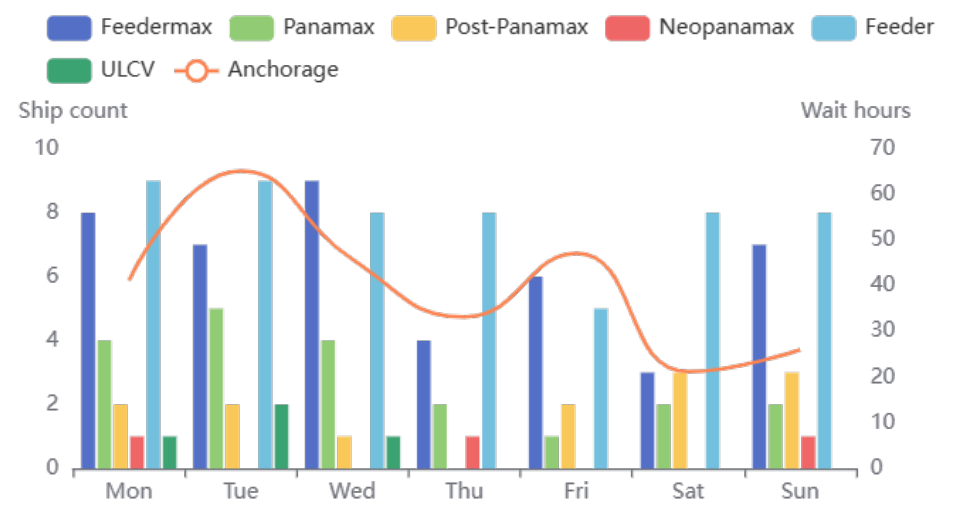
Type	M	T	W	Th	F	Sat	Sun
F.ma.	0	0	0	0	0	0	0
Pan.	0	0	0	0	0	0	0
PPx	0	0	0	0	0	0	0
NPx	0	0	0	0	0	0	0
Fd	0	0	0	0	0	0	0
WT.h.	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Ulcw	0	0	0	0	0	0	0



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

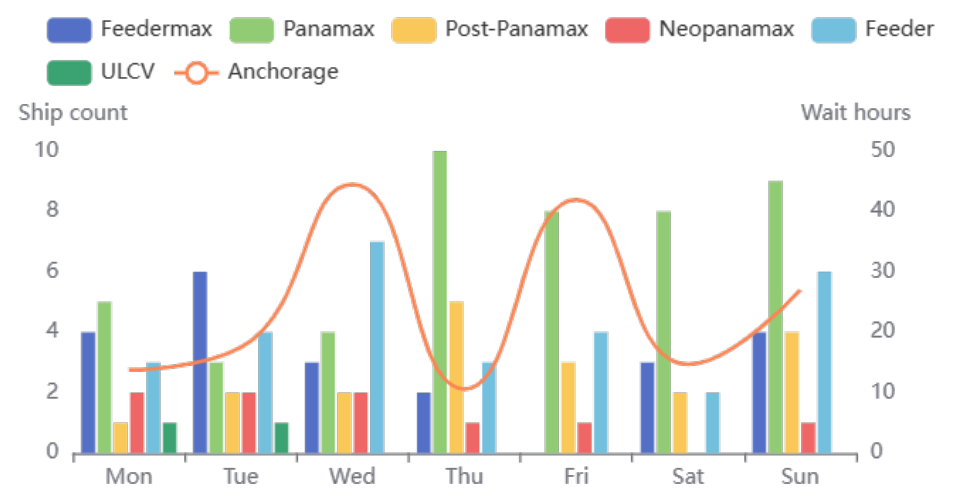
Type	M	T	W	Th	F	Sat	Sun
F.ma.	8	7	9	4	6	3	7
Pan.	4	5	4	2	1	2	2
PPx	2	2	1	0	2	3	3
NPx	1	0	0	1	0	0	1
Fd	9	9	8	8	5	8	8
Ulcw	1	2	1	0	0	0	0
WT.h.	41.2	65.2	45.8	33.2	47.15	21.2	26



最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

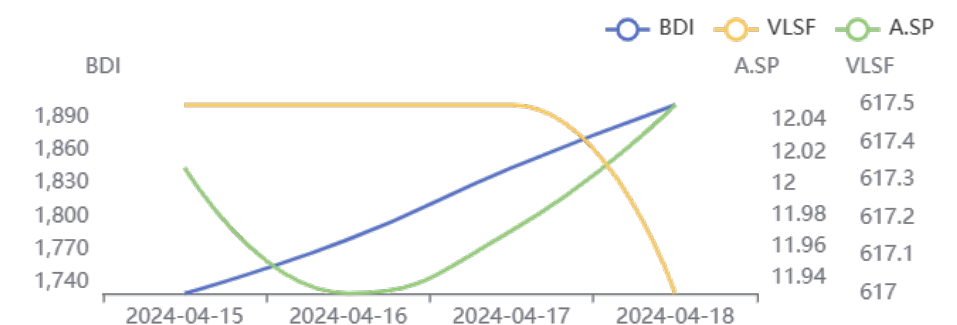
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

Type	M	T	W	Th	F	Sat	Sun
F.ma.	4	6	3	2	0	3	4
Pan.	5	3	4	10	8	8	9
PPx	1	2	2	5	3	2	4
NPx	2	2	2	1	1	0	1
Fd	3	4	7	3	4	2	6
Ulcw	1	1	0	0	0	0	0
WT.h.	13.8	17.5	44.5	10.6	41.95	14.7	27



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

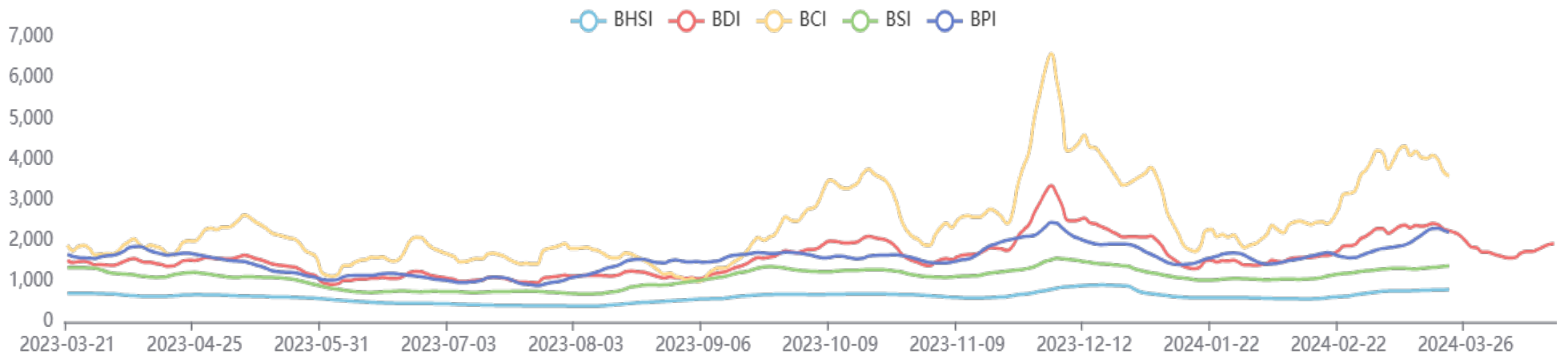
Type	M	T	W	Th	F	Sat	Sun
BDI	1736	1754	1805	1876	1916		
VLSF	617.50	617.50	617.50	617.00			
A.SP	12.01	11.93	11.97	12.05	11.99	11.94	



第三部分 航运市场 SHIPPING MARKET

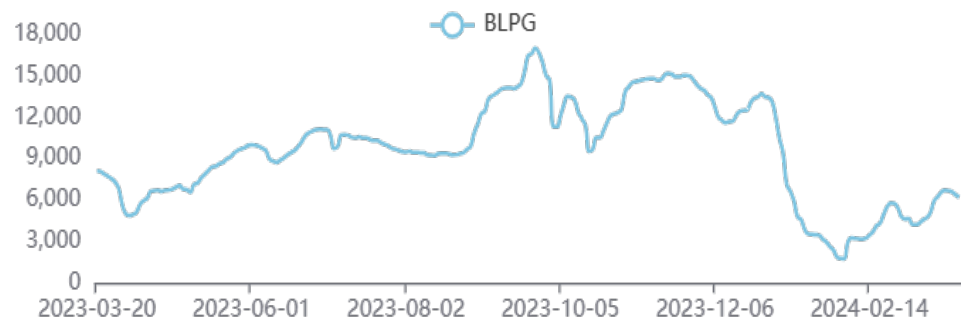
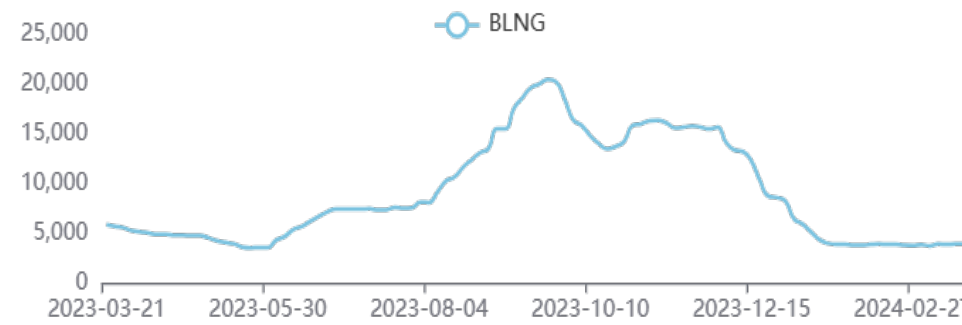
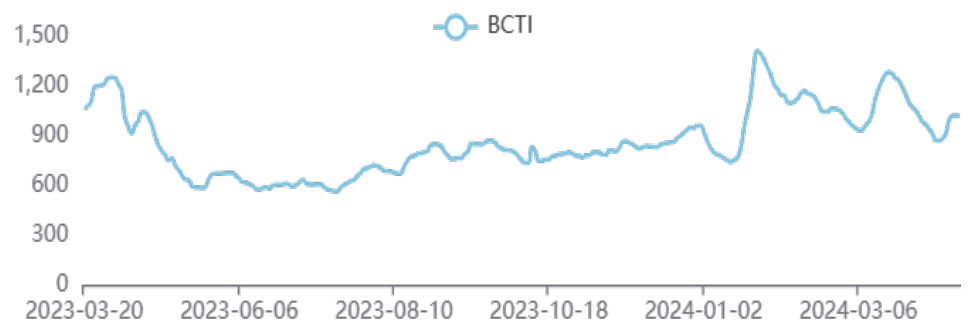
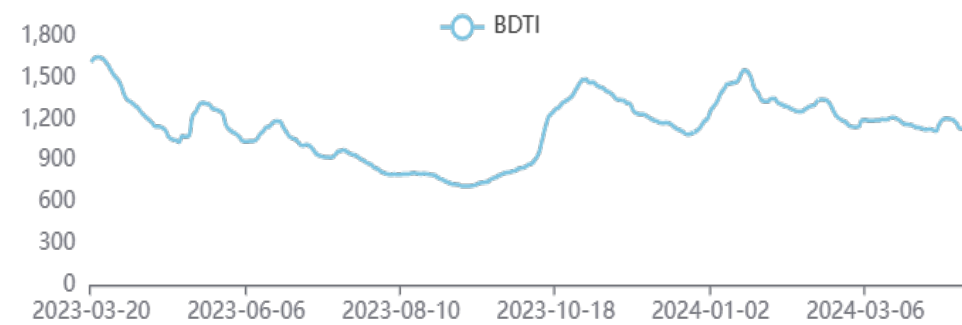
波罗的海干散货指数Baltic Dry Index

Type	PI	WoW	W%	M%	y%
BDI	795	18.0	2.32	28.64	12.77
BCI	1919	190.0	10.99	-12.61	39.87
BPI	1994	79.0	4.13	5.22	Infinity
BSI	741	19.0	2.63	-6.79	Infinity
BHSI	5467	209.0	3.97	3.0	Infinity

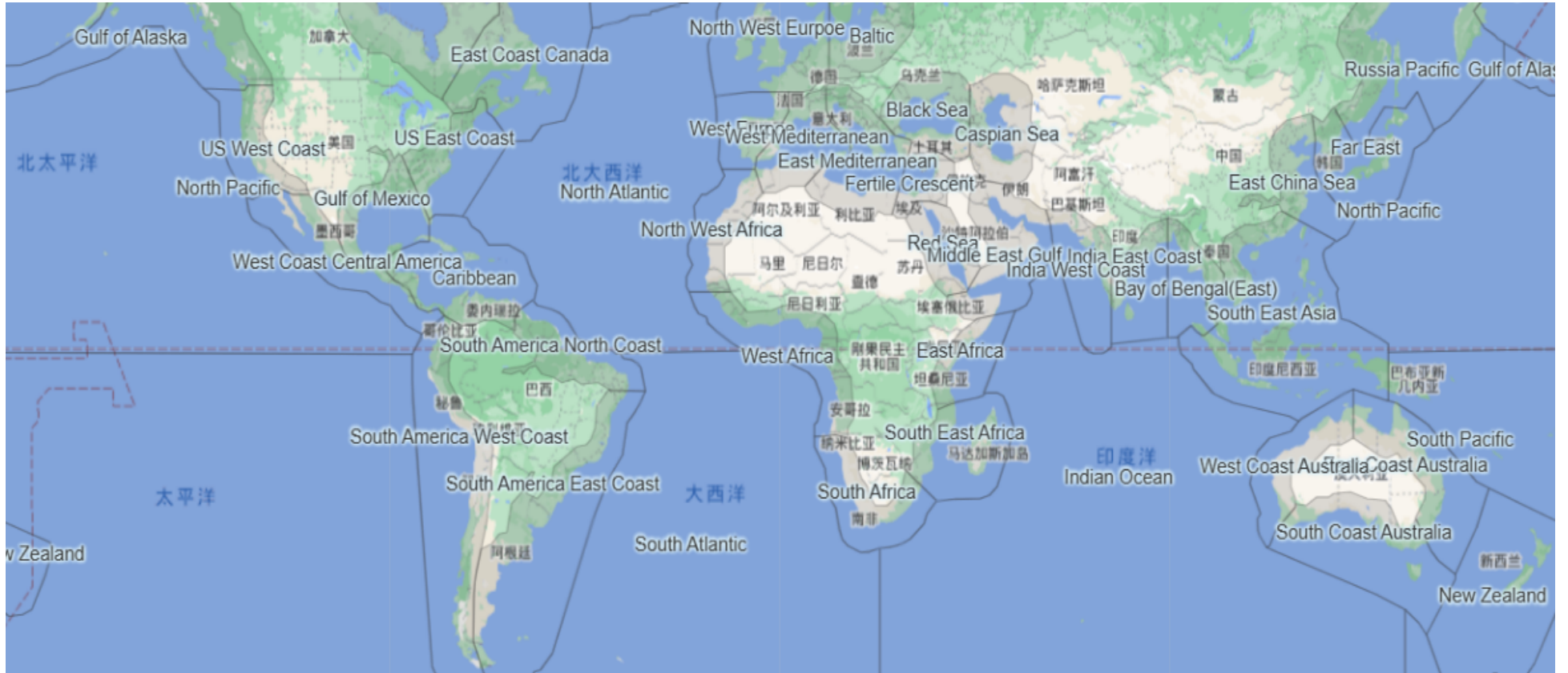


能源运价指数Energy Shipping Index

Type	PI	WoW	W%	M%	y%
BDTI	1394	122.0	9.59	0.8	Infinity
BCTI	1114	-88.0	-7.32	-4.05	-5.11
BLNG	2078	-16.0	-0.76	4.21	Infinity
BLPG	2388	-127.0	-5.05	-14.04	Infinity



第四部分 运力分布 SUPPLY DISTRIBUTION

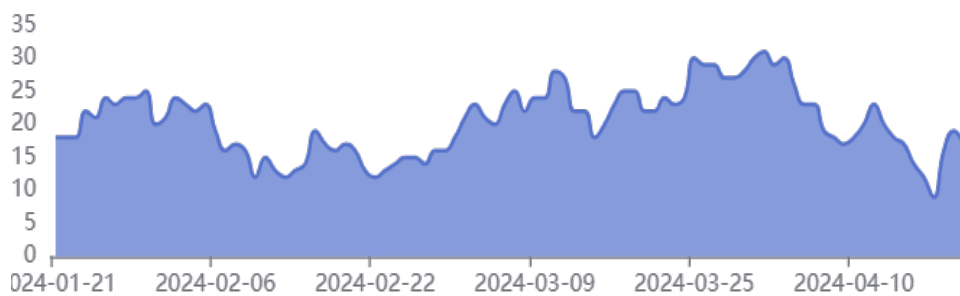


好望角型散货船 Capesize

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.

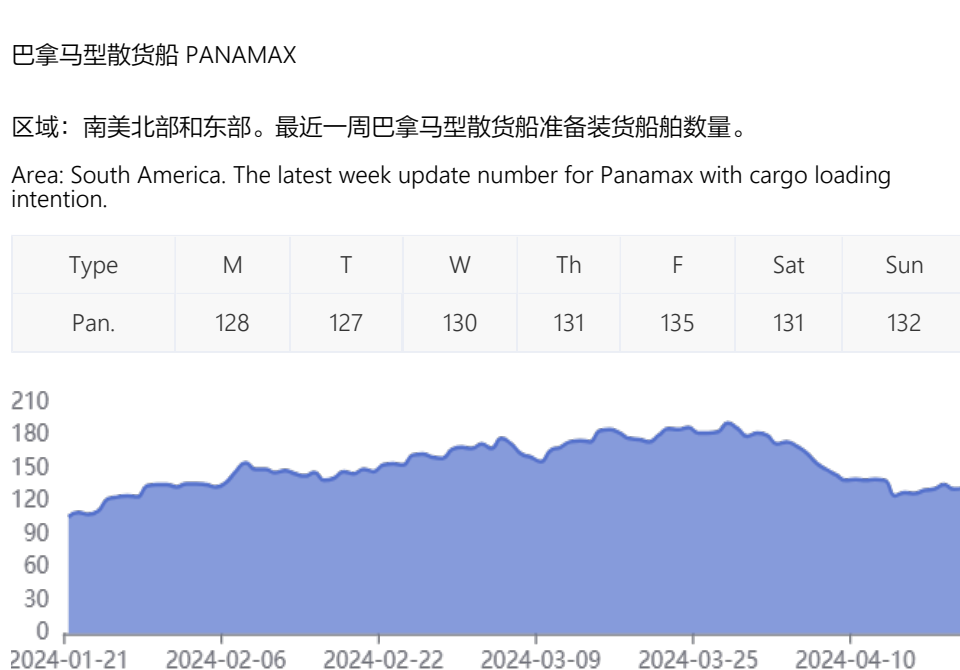
Type	M	T	W	Th	F	Sat	Sun
Cape	17	14	12	9	16	19	17



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.

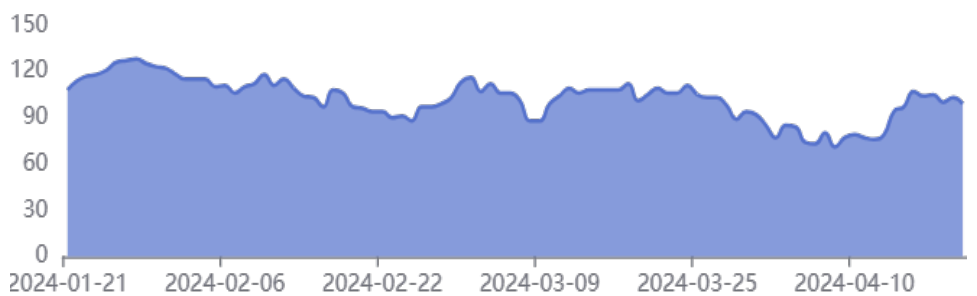
Type	M	T	W	Th	F	Sat	Sun
Cape	25	24	25	27	29	30	29



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.

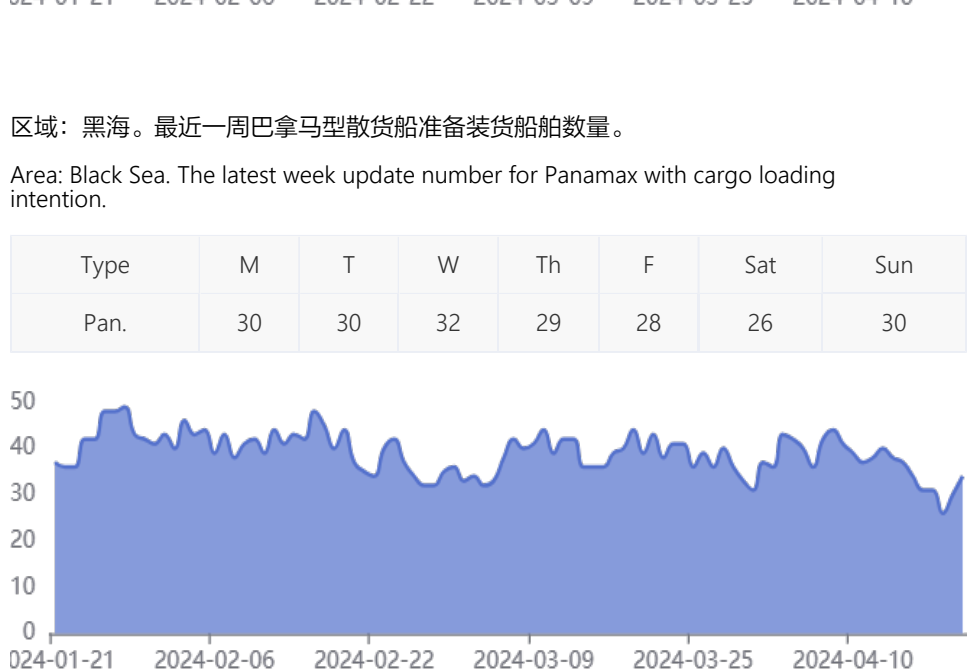
Type	M	T	W	Th	F	Sat	Sun
Cape	97	107	104	105	100	103	99



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.	30	30	32	29	28	26	30

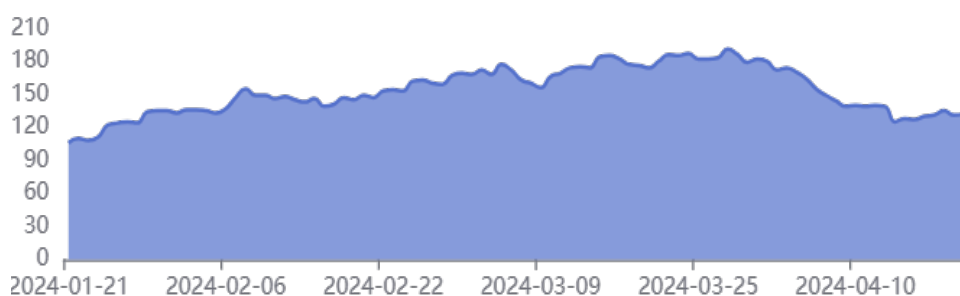


巴拿马型散货船 PANAMAX

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.

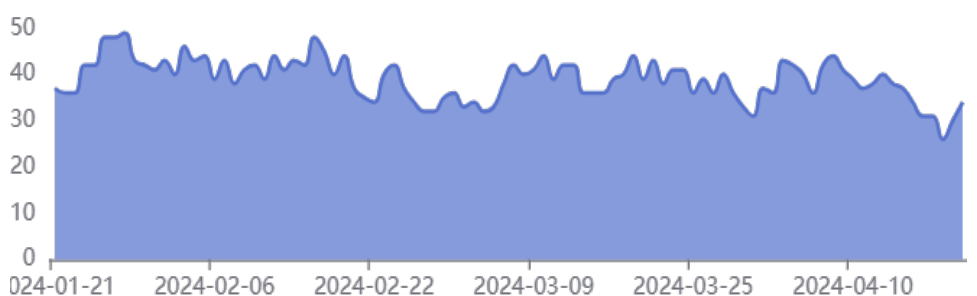
Type	M	T	W	Th	F	Sat	Sun
Pan.	128	127	130	131	135	131	132



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.

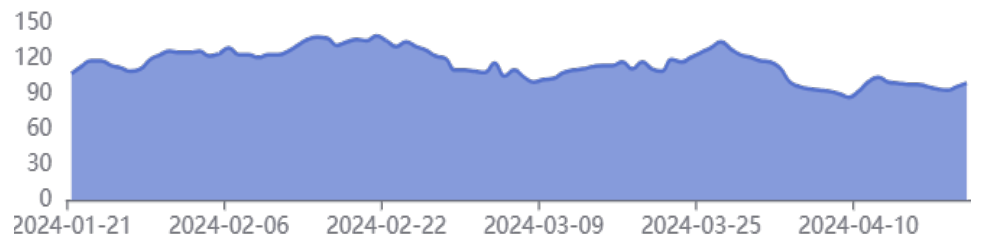
Type	M	T	W	Th	F	Sat	Sun
Pan.	30	30	32	29	28	26	30



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.	98	98	96	94	93	96	99

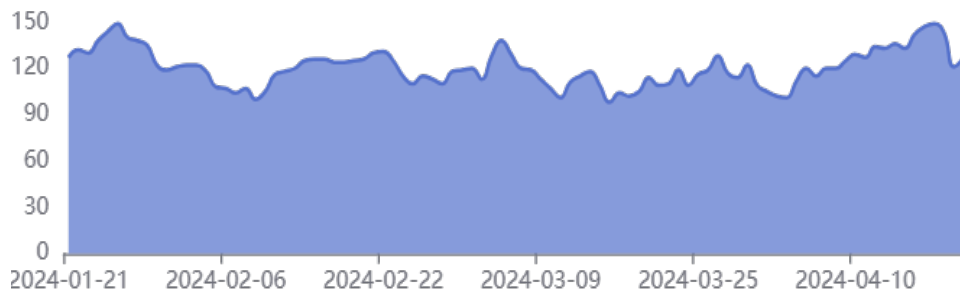


超大灵便型散货 SUPRAMAX

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.

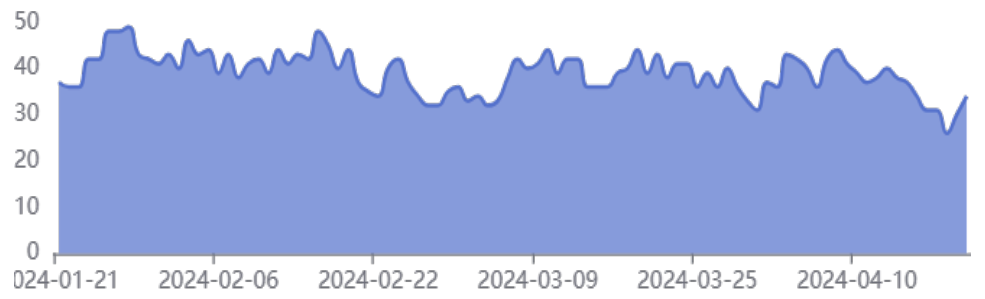
Type	M	T	W	Th	F	Sat	Sun
SMX	133	142	147	149	143	121	127



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.

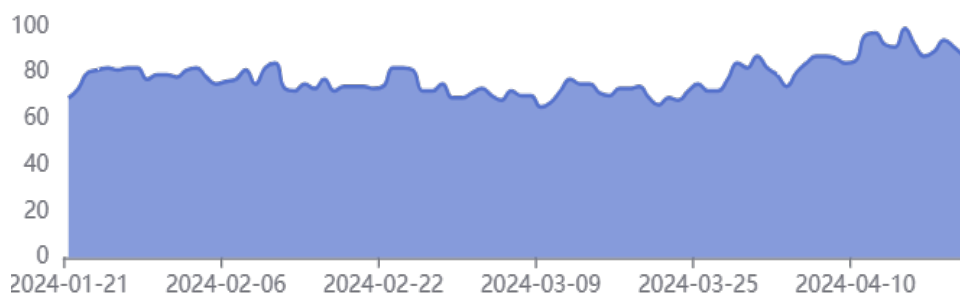
Type	M	T	W	Th	F	Sat	Sun
SMX	37	34	31	31	26	30	34



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.

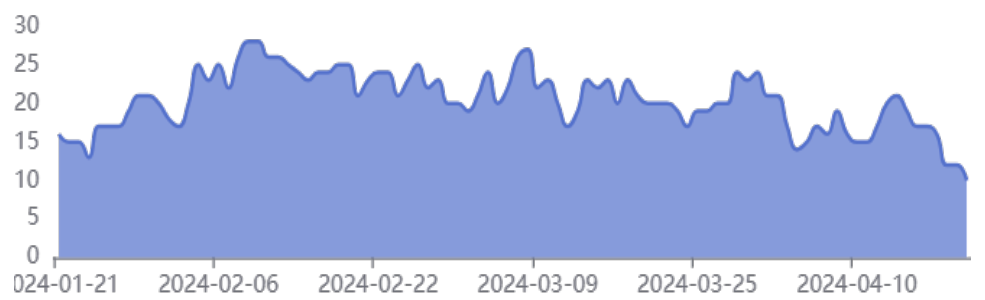
Type	M	T	W	Th	F	Sat	Sun
SMX	19	17	17	16	12	12	10



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	99	92	87	89	94	91	87



第五部分 远期运价协议 FFA

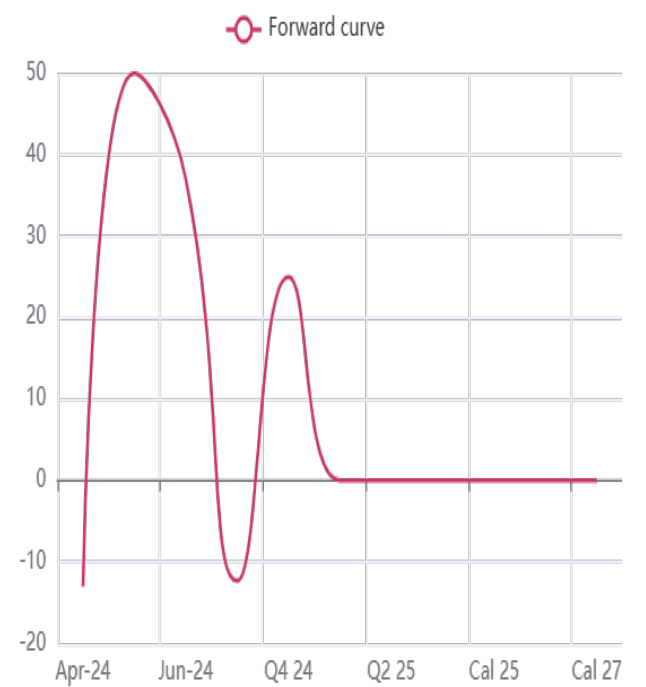
好望角型散货船Capesize

5TC	\$/day	WoW	
Apr-24	21,850.00	-50.0	-0.2 %
May-24	27,189.00	271.0	1.0 %
Jun-24	28,125.00	286.0	1.0 %
Q3 24	27,447.67	171.33	0.6 %
Q4 24	26,893.00	157.0	0.6 %
Q1 25	16,093.00	-3.0	0.0 %
Q2 25	20,850.00	-29.0	-0.1 %
Q3 25	23,479.00	29.0	0.1 %
Cal 25	21,009.00	4.5	0.0 %
Cal 26	20,014.00	-32.0	-0.2 %
Cal 27	19,296.00	0.0	0.0 %



灵便型散货船Handysize

7TC	\$/day	WoW	
Apr-24	13,675.00	-13.0	-0.1 %
May-24	14,550.00	50.0	0.3 %
Jun-24	14,375.00	37.0	0.3 %
Q3 24	14,100.33	-12.33	-0.1 %
Q4 24	13,613.00	25.0	0.2 %
Q1 25	11,138.00	0.0	0.0 %
Q2 25	11,875.00	0.0	0.0 %
Q3 25	12,944.00	0.0	0.0 %
Cal 25	12,225.25	0.0	0.0 %
Cal 26	11,763.00	0.0	0.0 %
Cal 27	11,575.00	0.0	0.0 %



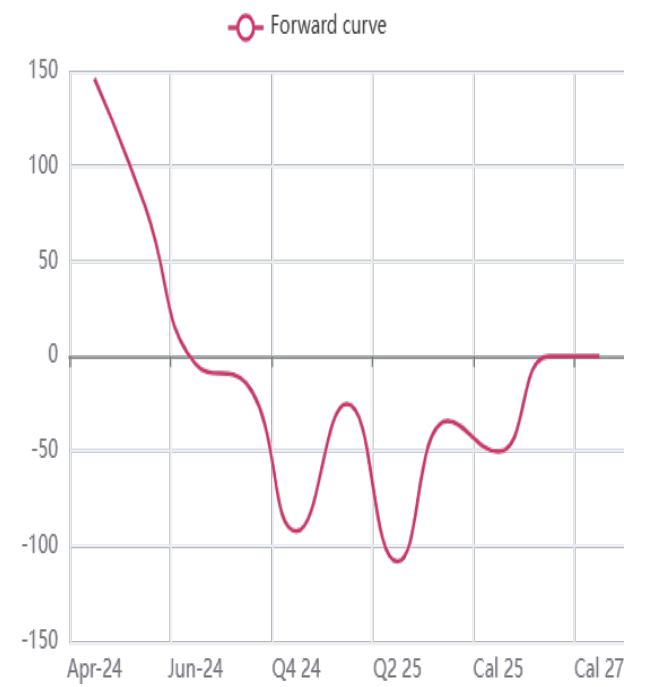
巴拿马型散货船Panamax

4TC	\$/day	WoW	
Apr-24	15,107.00	178.0	1.2 %
May-24	16,407.00	121.0	0.7 %
Jun-24	16,611.00	257.0	1.6 %
Q3 24	16,310.33	-44.33	-0.3 %
Q4 24	15,096.00	-104.0	-0.7 %
Q1 25	12,550.00	7.0	0.1 %
Q2 25	13,893.00	-14.0	-0.1 %
Q3 25	13,664.00	-15.0	-0.1 %
Cal 25	13,357.00	-5.5	0.0 %
Cal 26	12,595.00	24.0	0.2 %
Cal 27	12,273.00	23.0	0.2 %



超大灵便型散货船Supramax

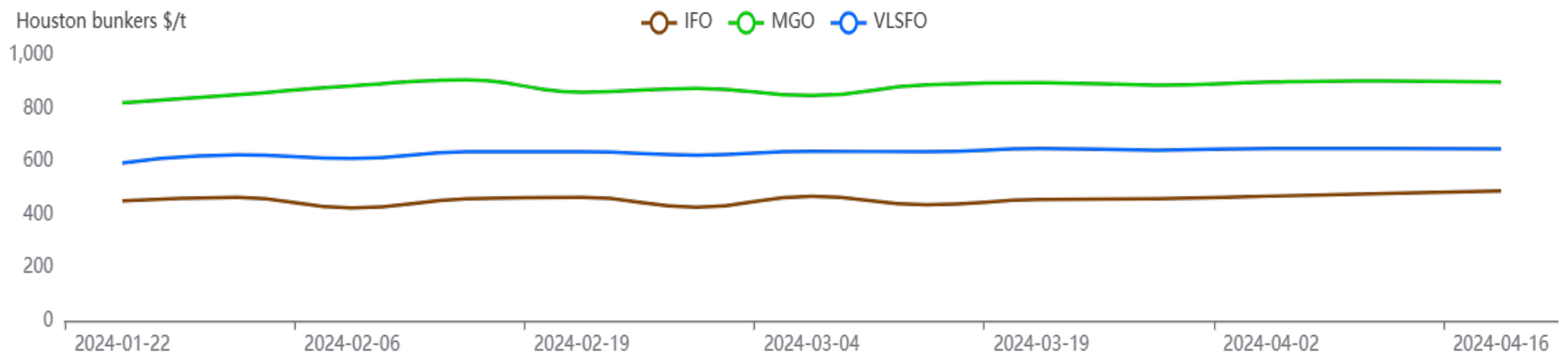
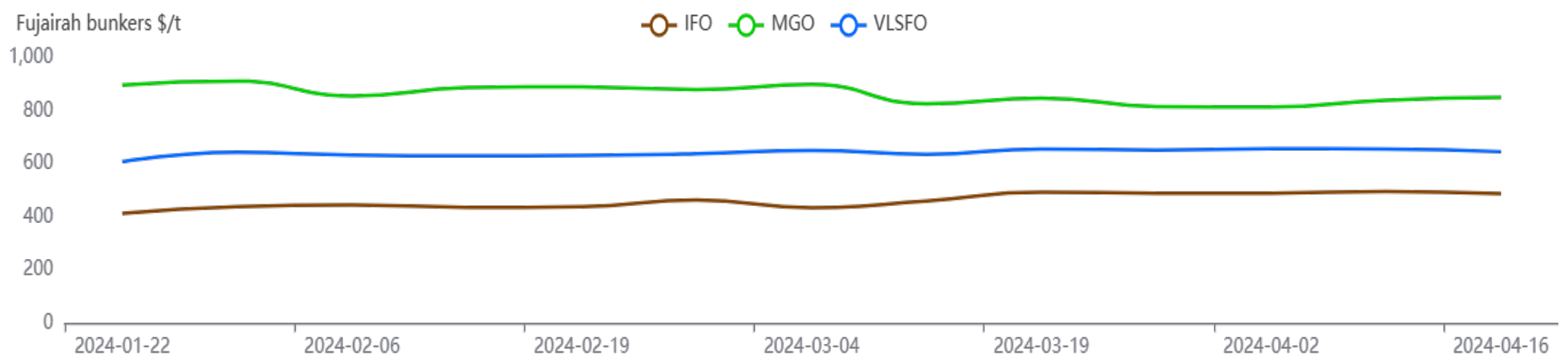
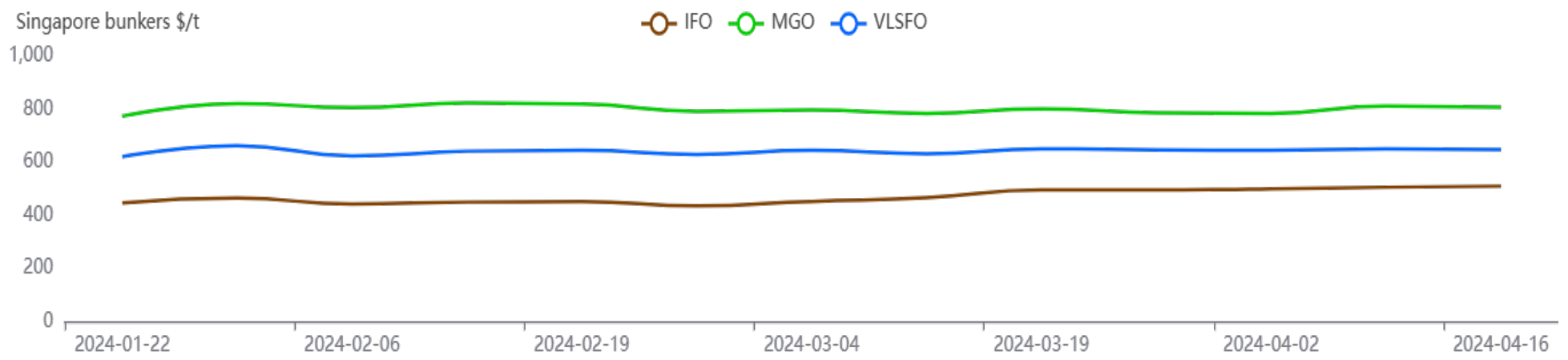
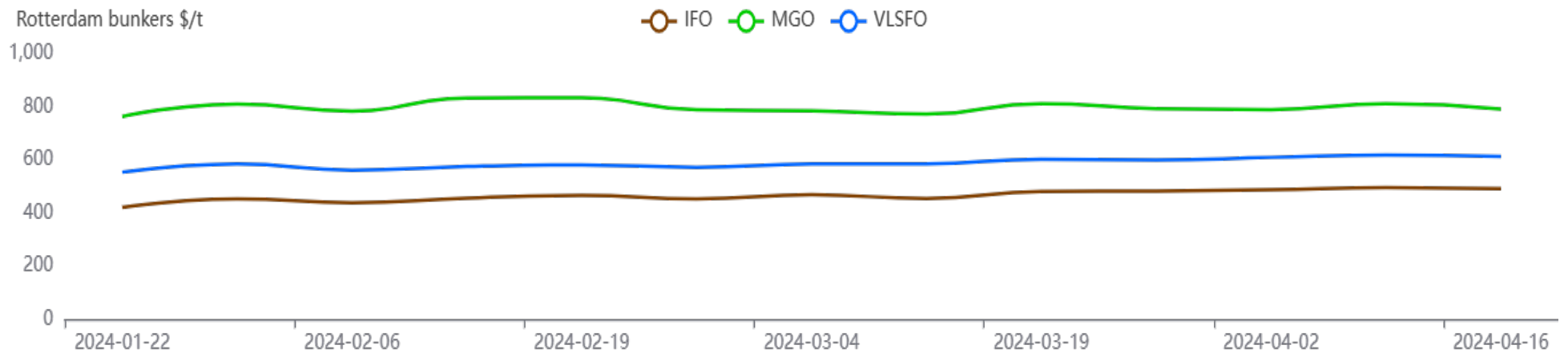
10TC	\$/day	WoW	
Apr-24	14,838.00	146.0	1.0 %
May-24	16,033.00	79.0	0.5 %
Jun-24	15,850.00	-4.0	0.0 %
Q3 24	15,436.00	-14.0	-0.1 %
Q4 24	14,525.00	-92.0	-0.6 %
Q1 25	11,917.00	-25.0	-0.2 %
Q2 25	13,167.00	-108.0	-0.8 %
Q3 25	13,400.00	-34.0	-0.3 %
12,971.00	Cal 25	-50.25	-0.4 %
Cal 26	12,346.00	0.0	0.0 %
Cal 27	12,008.00	0.0	0.0 %



第六部分 燃油价格 BUNKER PRICE

MP	LO	HO	MO	SP	WoW	W%	M%
zhoushan	649.5	515.0	825.5	134.5	-4.0	-2.89	-11.8
Singapore	648.0	510.0	808.0	138.0	-6.5	-4.5	-10.68
Rotterdam	613.5	491.5	792.0	122.0	-1.0	-0.81	0.83
Fujairah	646.0	487.5	851.0	158.5	-2.0	-1.25	-2.16
Houston	647.5	489.0	900.0	158.5	-10.5	-6.21	-17.23

(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	1.02	-22.96
Maize		199.0	2.0	1.02	1.02	-32.31
Soybeans		219.0	-28.0	-11.34	-13.78	-22.06
Rice		247.0	-3.0	-1.2	12.27	23.5
Barley		208.0	-1.0	-0.48	1.96	-23.25
Energy		Index	+/-	Weekly	Monthly	YTD
Crude Oil	USD/Bbl	84.88	-1.16	-1.35	2.83	3.56
Brent	USD/Bbl	89.72	-0.53	-0.59	3.55	6.58
Natural Gas	USD/MMBtu	1.75	-0.02	-1.13	1.16	-12.94
Gasoline	USD/Gal	2.79	0.03	1.09	1.82	-0.71
Heating Oil	USD/Gal	2.67	-0.07	-2.55	-3.26	-1.11
Ethanol	USD/Gal	1.66	0.0	0.0	3.11	-23.15
Naphtha	USD/T	688.37	-9.51	-1.36	-3.42	2.13
Propane	USD/Gal	0.82	-0.03	-3.53	1.23	6.49
Uranium	USD/Lbs	88.75	1.75	2.01	-2.47	77.5
Methanol	CNY/T	2556.0	59.0	2.36	-1.46	3.11
TTF Gas	EUR/MWh	30.58	3.86	14.45	6.22	-30.39
UK Gas	GBP/thm	75.77	10.02	15.24	2.93	-25.94
Industrial		Index	+/-	Weekly	Monthly	YTD
Copper	USD/Lbs	4.29	0.02	0.47	5.41	6.98
Coal	USD/T	133.75	4.65	3.6	3.08	-32.45
Steel	CNY/T	3436.0	78.0	2.32	-3.07	-13.62
Iron Ore	USD/T	106.05	4.05	3.97	1.48	-11.26
Aluminum	USD/T	2545.0	78.5	3.18	12.34	9.06
Iron Ore Fe 62%	USD/T	2545.0	78.5	3.18	12.34	9.06
Metals		Index	+/-	Weekly	Monthly	YTD
Gold	USD/t.oz	2350.9	15.8	0.68	9.16	17.68
Silver	USD/t.oz	28.3	0.5	1.8	13.65	13.84
Platium	USD/t.oz	980.4	32.1	3.39	8.96	-2.55
Currencies		Index	+/-	Weekly	Monthly	YTD
EUR/USD		1.07	-0.01	-0.93	-0.93	-1.83
USD/CNY		7.26	0.01	0.14	0.69	5.52

第八部分 本周话题 WEEKLY TOPIC



区域动荡局势下船员的安全与自由

因为政治对抗和海盗行为正在使得某些区域威胁着海员自身的安全和自由。

据hiFleet数据显示，最近一次船舶劫持事件发生在今年4月13日，伊朗在霍尔木兹海峡劫持了一艘15,000箱位的MSC Aries(2020年建造)集装箱船；

北京时间3月23日晚上10点30分左右，一艘Aframax油轮被胡赛武装导弹击中，船舶起火，但该船未受到重大损害，继续航行前往下一个目的地；

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；

北京时间2024年3月6日凌晨，也门胡赛武装使用导弹袭击了美国橡树资本投资的散货船，直接导致三名船员死亡，另有三人伤势严重；

北京时间2月19日一艘英国杂货船被胡赛武装导弹袭击，所幸没有船员受伤，在情况不明情况下船员采取了弃船措施。该船载重吨3万2千载重吨，1997年建造。

北京时间1月11日中午，一艘希腊船东的SUEZMAX油轮（15万载重吨，2011年韩国造）在阿曼海被一群蒙面武装所劫持。

北京时间1月2号有一艘新加坡船东的化学品船在赤道几内亚外海被海盗所劫持，该船悬挂图

瓦卢船旗，13000载重吨，2007年韩国建造。

值得赞扬的是印度突击队3月20号登上了41600载重吨的“RUEN”号(2016年建造)，释放了17名海员，同时逮捕了船上的海盗犯罪团伙。该船于去年12月14号在阿拉伯海索科特拉岛以东450英里(725公里)处被劫持。

但遗憾的是2023年11月19日发生在红海的船舶劫持事件的船员还在经受着精神和身体的双重打击中。该船系胡赛武装人员在红海劫持的一艘悬挂巴哈马国旗的大型货船“GALAXY LEADER”，据hiFleet最新数据显示，该船依然停泊在卡马兰岛附近港湾锚地，时间一晃已超过5个月。

也有船舶侥幸逃脱海盗的魔掌，2024年1月4号，距离索马里Eyl东南方向约455海里，一艘航行中的散货船在雷达上发现了海盗船。海盗手持机关枪和火箭筒向该船开火。船长随即发出了警报，启动了SSAS，所有船员进入了船舶安全堡垒。附近的印度军舰很快做出反应，立即派出直升机前往事发地点，并成功登船对海盗进行了扫荡。获得安全信息后，船员们从堡垒中出来，又重新控制了这艘船，目前该船恢复航线并所有船员都安全。

除了海盗带来的风险，某些军事力量直接参与了船舶劫持，使得船员的安全和对航行的自由造成了极大的威胁，不能只是依靠船东有限的力量去解救被困扰的船员，需要国际组织多方面采取有效举措最大程度的解决船员安全和自由的问题。

Because political rivalries and piracy are making certain regions threatening the safety and freedom of seafarers themselves.

According to hiFleet data, the most recent hijacking occurred on April 13 this year when Iran hijacked a 15,000-seat MSC Aries(2020 built) container ship in the Strait of Hormuz;

At around 10:30 PM Beijing time on March 23, an Aframax oil tanker was hit by a Houthi missile and the ship caught fire, but the ship did not suffer major damage and continued to sail to its next destination;

At about 3 p.m. on March 12, Beijing time, pirates hijacked the ship 1,100 nautical miles northeast of Mogadishu, Somalia, and all 23 crew members were taken hostage.

In the early morning of March 6, 2024, Beijing time, Yemen's Houthi armed forces used missiles to attack the bulk carrier invested by Oaktree Capital of the United States, directly resulting in the death of three crew members and serious injuries to three others;

On February 19, Beijing time, a British grocery ship was attacked by Houthi armed missiles, but fortunately no crew was injured, and the crew took measures to abandon ship under unknown circumstances. The ship has a deadweight of 32,000 deadweight tons and was built in 1997.

At noon on January 11, Beijing time, a Greek ship owner's SUEZMAX tanker (150,000 DWT, 2011 South Korea-built) was hijacked in the Sea of Oman by a group of masked armed men. On January 2, Beijing time, a chemical tanker owned by a Singaporean owner was hijacked by pirates off the coast of Equatorial Guinea. The Tuvalu-flagged, 13,000 DWT vessel was built in South Korea in 2007.

To their credit, Indian commandos boarded the 41,600 DWT RUEN (built in 2016) on March 20, releasing 17 sailors and arresting the criminal pirate gang on board. The ship was hijacked on December 14, 450 miles (725 kilometers) east of the Arabian Sea island of Socotra.

Unfortunately, the crew of the ship hijacked in the Red Sea on November 19, 2023, are still suffering from both mental and physical shock. The ship is a large Bahamian-flagged cargo ship "GALAXY LEADER" hijacked by Houthi armed men in the Red Sea, according to the latest data from hiFleet, the ship is still anchored in the harbor anchorage near Kamalan Island, time has been more than five months.

On January 4, 2024, about 455 nautical miles southeast of Eyl, Somalia, a bulk carrier in transit picked up the pirate ship on radar. Pirates armed with machine guns and rocket launchers opened fire on the ship. The captain then sounded the alarm, activated the SSAS, and all the crew entered the ship's safety fort. Nearby Indian warships quickly responded, immediately sent a helicopter to the site, and successfully boarded the ship to sweep up the pirates. After receiving safety information, the crew emerged from the fort and regained control of the ship, which is now back on course and all crew members are safe.

In addition to the risks brought by piracy, some military forces directly participate in the hijacking of ships, which makes the safety of crew members and poses a great threat to the freedom of navigation. Instead of relying only on the limited strength of shipowners to rescue the troubled crew members, international organizations need to take effective measures in various aspects to solve the problem of crew members' safety and freedom to the greatest extent.