



2024年 第17周市场周报

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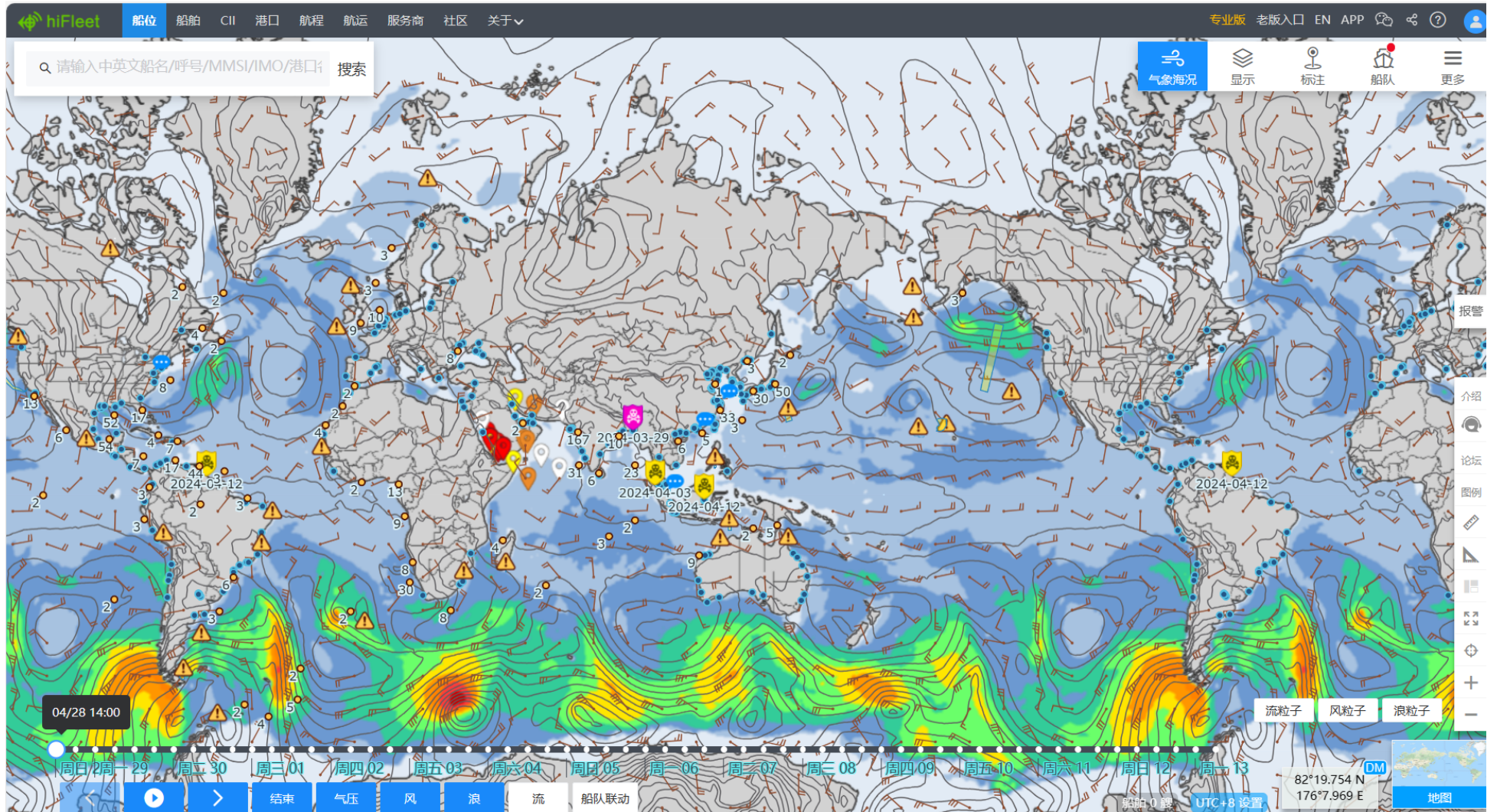
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最新商品价格 LATEST COMMODITIES PRICE

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926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 926 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.

海盗事件 Piracy

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

其它 Others

没有 Nil

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米中浪到1米轻浪；台湾海峡风力有时5级，台湾海峡洋面海浪将经历2米中浪，南海大部海域风力维持在4-5级，有中浪。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 breeze to moderate with the seas from moderate to slight. 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 moderate sea. Low-pressure in the north of North Atlantic and Pacific Ocean become small, sea conditions are improving.

海上事件 Marine Incidents

胡塞武装分子在红海南部对一艘油轮进行了两次袭击，这是沉默一个多月来该武装首次袭击商船。中一次导弹袭击损坏了这艘船船舶，爆炸发生在离也门Mocha港14海里的地方。Houthi militants have carried out two attacks on an oil tanker in the southern Red Sea, the first time they have attacked a commercial vessel in more than a month of silence. A missile attack damaged the ship and the explosion occurred 14 nautical miles off the Yemeni port of Mocha.

备注 Remark

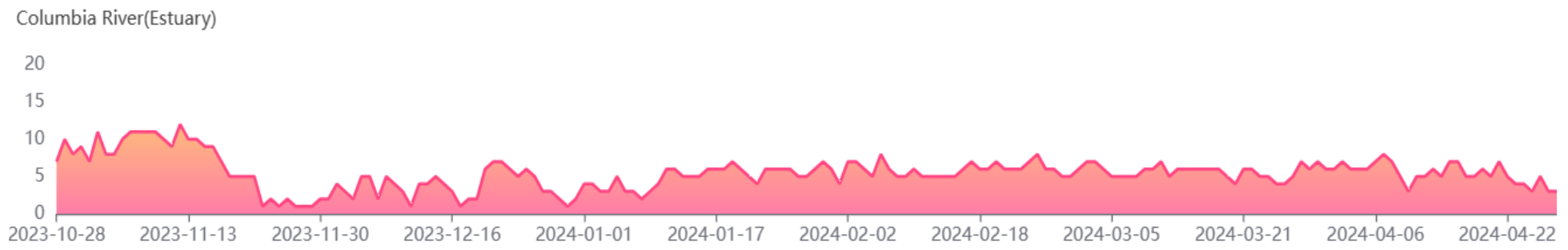
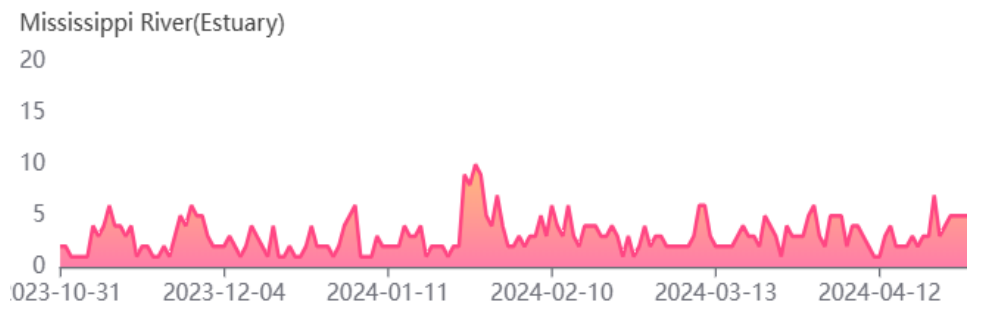
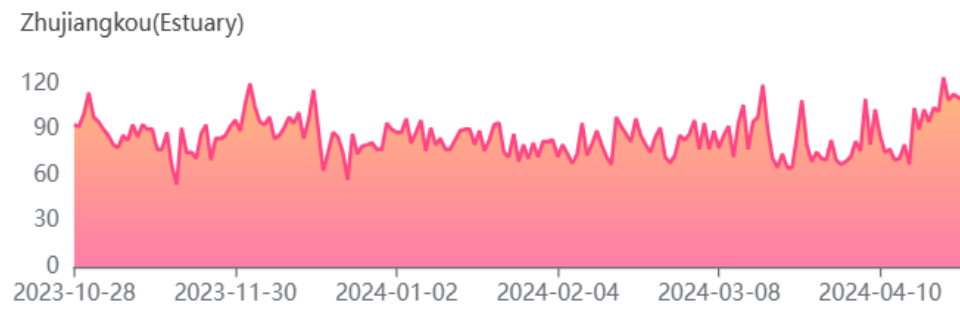
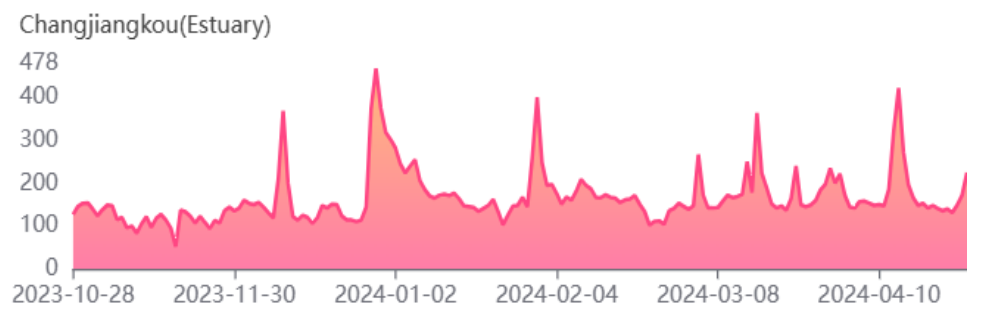
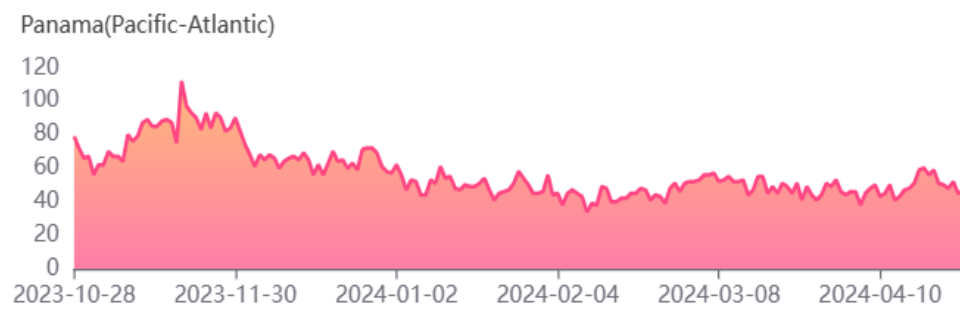
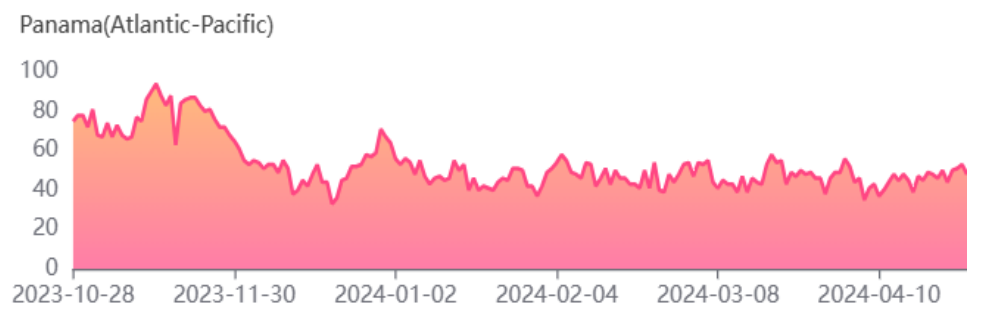
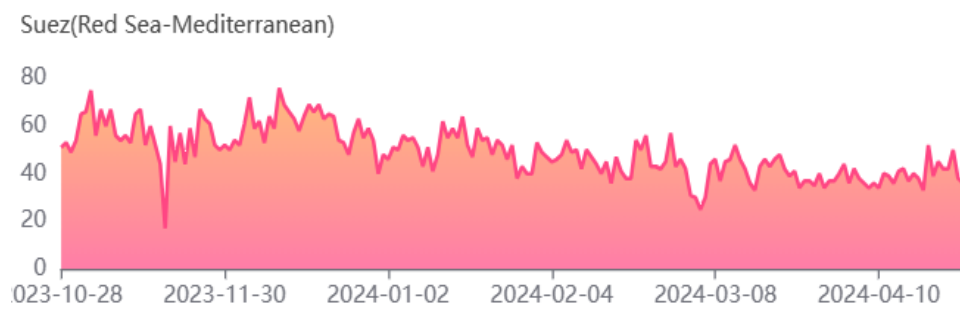
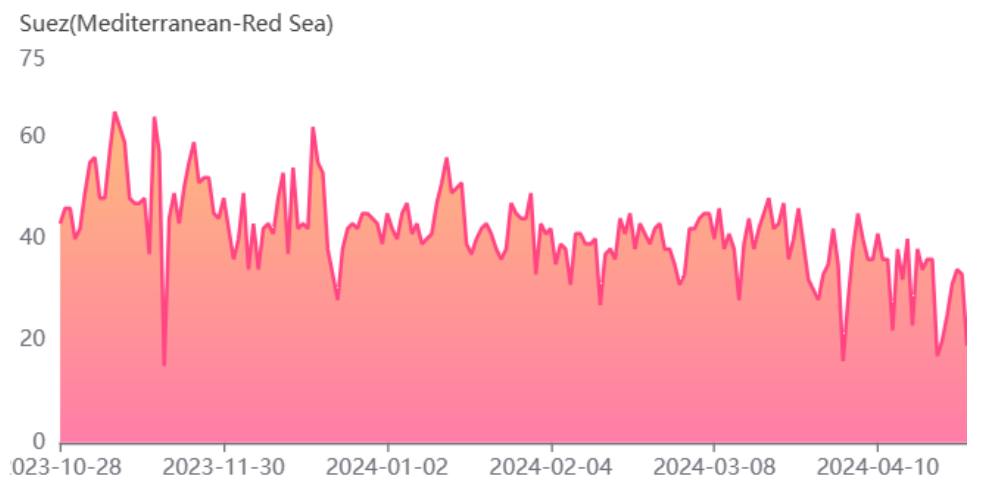
本报告数据截止时间为2024年4月28日北京时间17点；所有数据和或观点仅供参考，在任何情况下本公司及其员工不承担任何风险。The data deadline for this report is Beijing time 17 hours on Apr 28 of 2024; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

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	29	1133	-1	-12
Miss.Riv.	5	101	16	10
CJK	225	5278	-408	21
Pa.Atlan.	48	1338	24	-27
Colum.Riv.	3	157	-13	-6
Suez.Med.	19	942	-62	-214
Pa.Pac.	47	1406	-25	-40
ZJK	114	2616	172	193

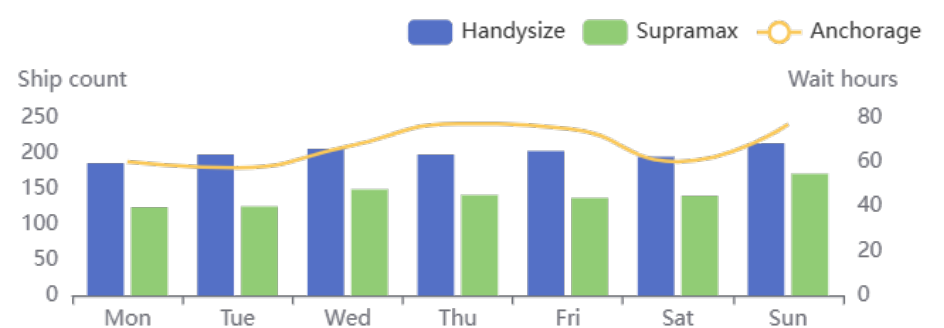


(P.N.-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

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

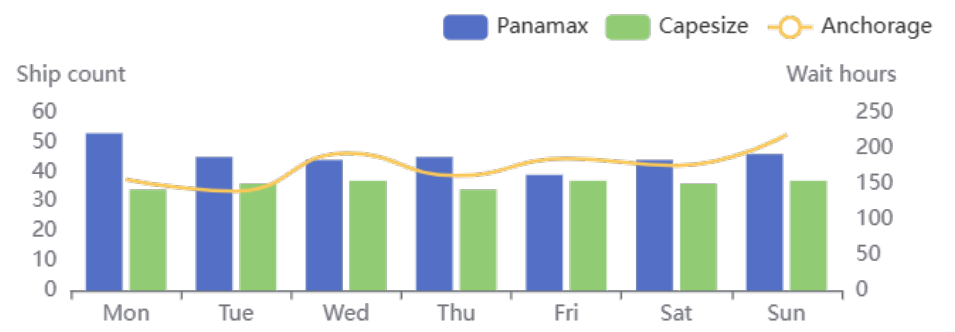
Type	M	T	W	Th	F	Sat	Sun
HDY	186	198	206	198	203	195	214
SMX	124	125	149	141	137	140	171
WT.h.	60.1	57.5	67	77.3	75.1	60.2	77



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

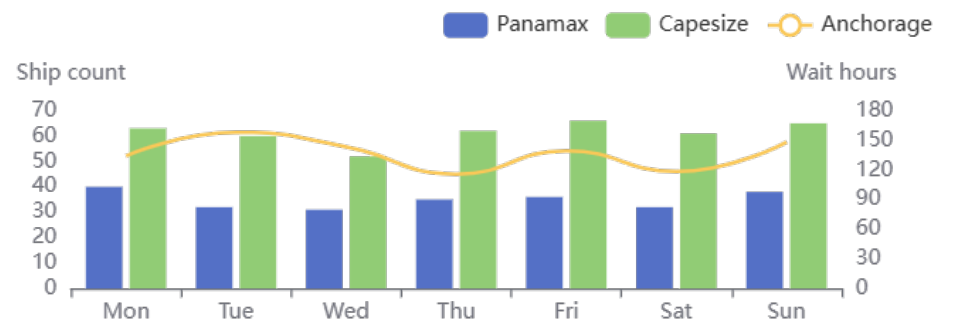
Type	M	T	W	Th	F	Sat	Sun
Pan.	53	45	44	45	39	44	46
Cap	34	36	37	34	37	36	37
WT.h.	156.2	139.7	193	161.3	185.3	175.75	219



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

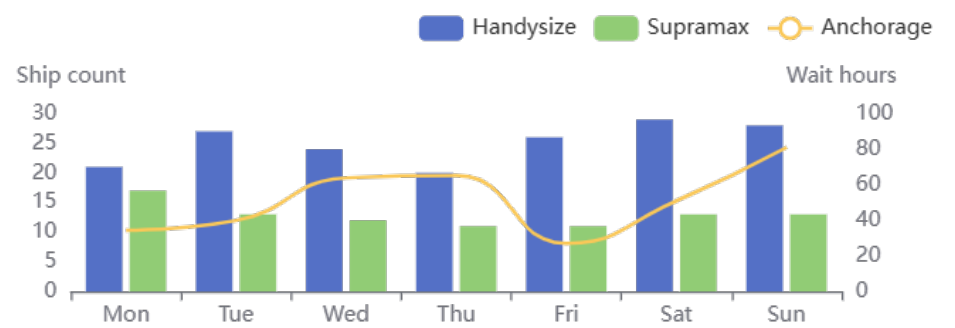
Type	M	T	W	Th	F	Sat	Sun
Pan.	40	32	31	35	36	32	38
Cap	63	60	52	62	66	61	65
WT.h.	134.2	158.2	143.4	115.7	139.3	118.3	148



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

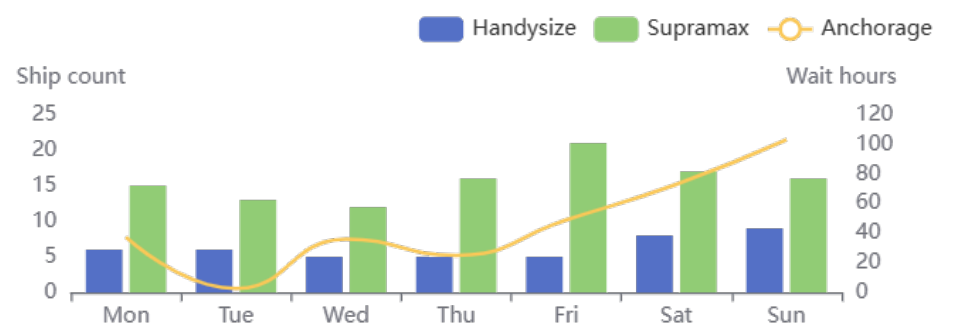
Type	M	T	W	Th	F	Sat	Sun
HDY	21	27	24	20	26	29	28
SMX	17	13	12	11	11	13	13
WT.h.	34.4	39.9	63.9	65.3	27	51	81



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

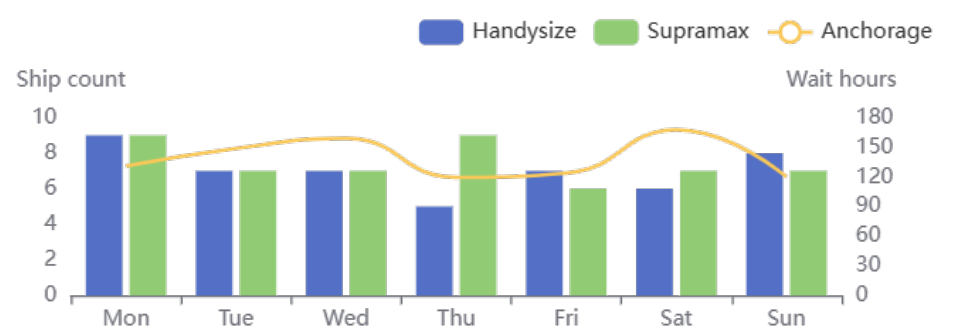
Type	M	T	W	Th	F	Sat	Sun
HDY	6	6	5	5	5	8	9
SMX	15	13	12	16	21	17	16
WT.h.	37.4	2.6	36	25	49	73	103



最近一周拉普拉特河区域超大型散货船和灵便型散货船舶锚泊数量和平均锚泊时长

Latest Week Update for Supra and Handy Num. and Waiting Time Information in Anchorages of Plate River

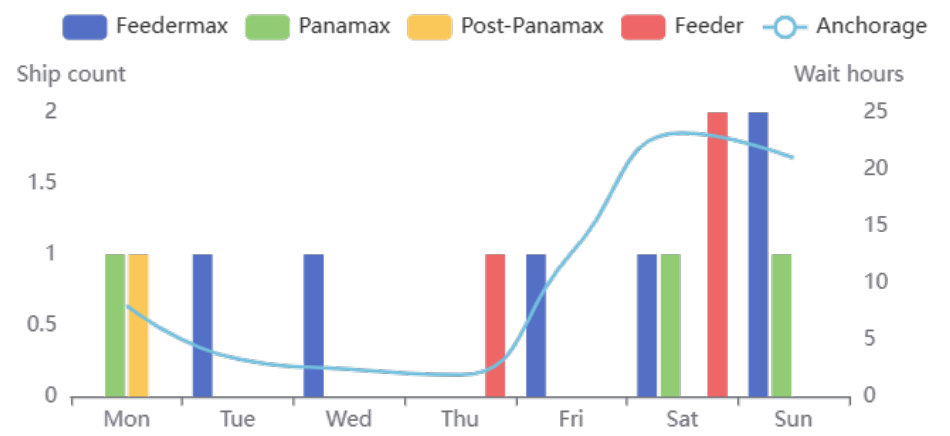
Type	M	T	W	Th	F	Sat	Sun
HDY	9	7	7	5	7	6	8
SMX	9	7	7	9	6	7	7
WT.h.	130.9	148.85	159.05	119.6	123.9	167.6	120



最近一周香港区域集装箱船锚泊数量和平均等待时长

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

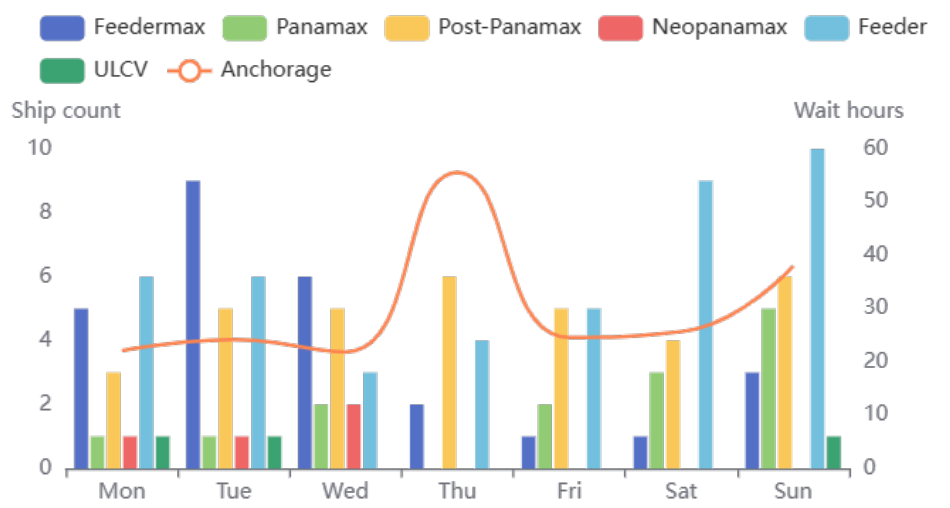
Type	M	T	W	Th	F	Sat	Sun
F.ma.	0	1	1	0	1	1	2
Pan.	1	0	0	0	0	1	1
PPx	1	0	0	0	0	0	0
NPx	0	0	0	0	0	0	0
Fd	0	0	0	1	0	2	0
WT.h.	8.0	3.3	2.4	1.9	12.6	23.2	21
UlcV	0	0	0	0	0	0	0



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

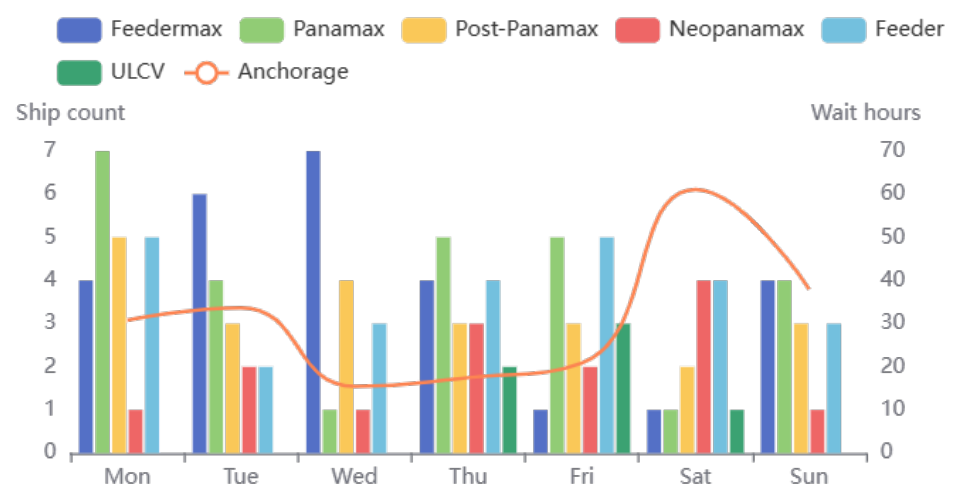
Type	M	T	W	Th	F	Sat	Sun
F.ma.	5	9	6	2	1	1	3
Pan.	1	1	2	0	2	3	5
PPx	3	5	5	6	5	4	6
NPx	1	1	2	0	0	0	0
Fd	6	6	3	4	5	9	10
UlcV	1	1	0	0	0	0	1
WT.h.	22.1	24.2	21.9	55.6	24.6	25.7	38



最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

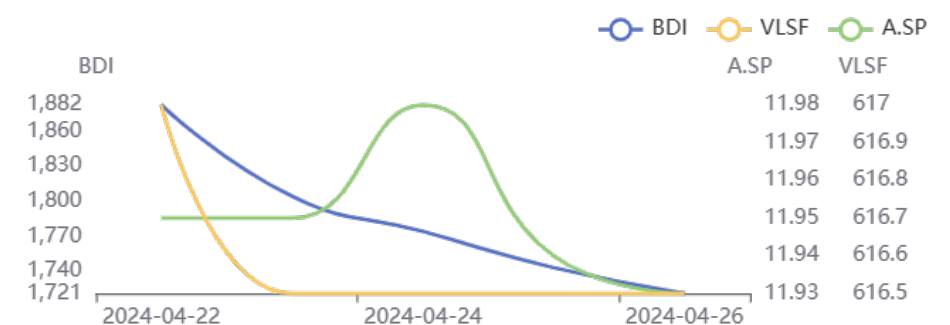
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

Type	M	T	W	Th	F	Sat	Sun
F.ma.	4	6	7	4	1	1	4
Pan.	7	4	1	5	5	1	4
PPx	5	3	4	3	3	2	3
NPx	1	2	1	3	2	4	1
Fd	5	2	3	4	5	4	3
UlcV	0	0	0	2	3	1	0
WT.h.	30.8	33.7	15.5	17.5	20.9	61.1	38



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

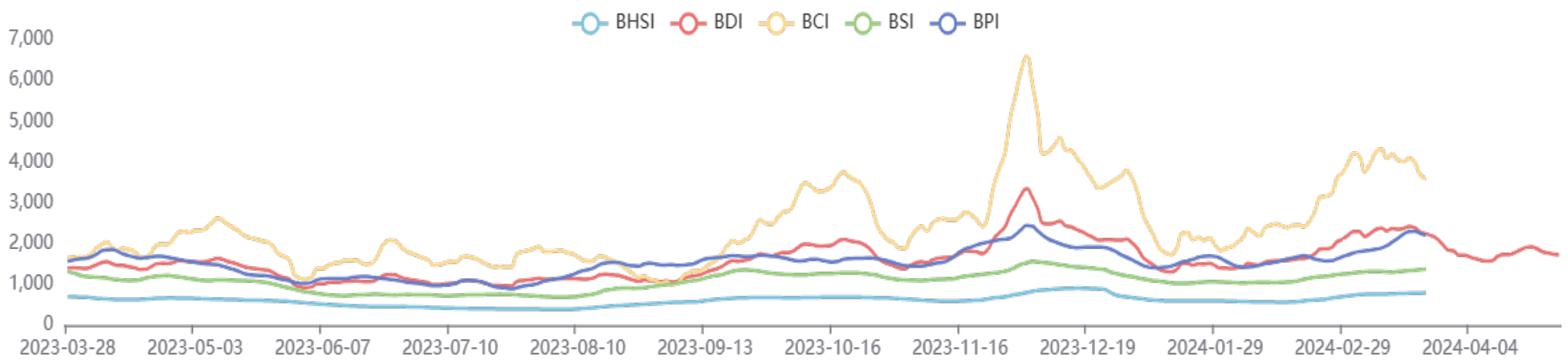
Type	M	T	W	Th	F	Sat	Sun
BDI	1928	1914	1910	1896	1878		
VLSF	617.00	616.50	616.50	616.50	616.50		
A.SP	11.95	11.95	11.98	11.94	11.93	11.88	



第三部分 航运市场 SHIPPING MARKET

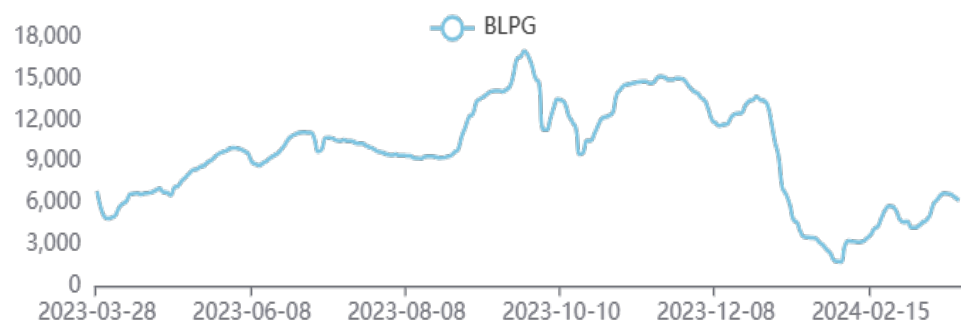
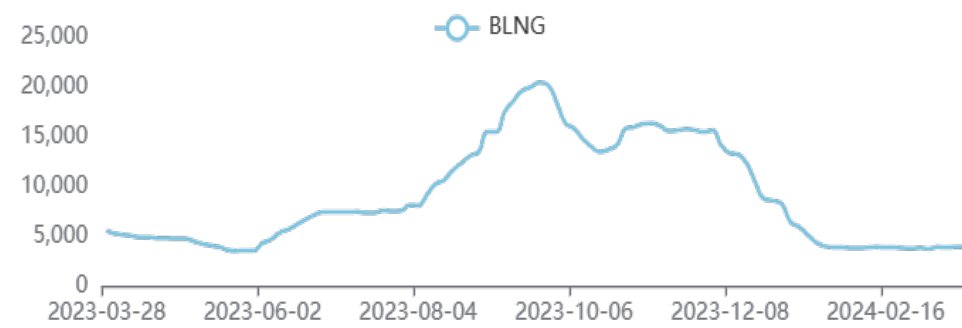
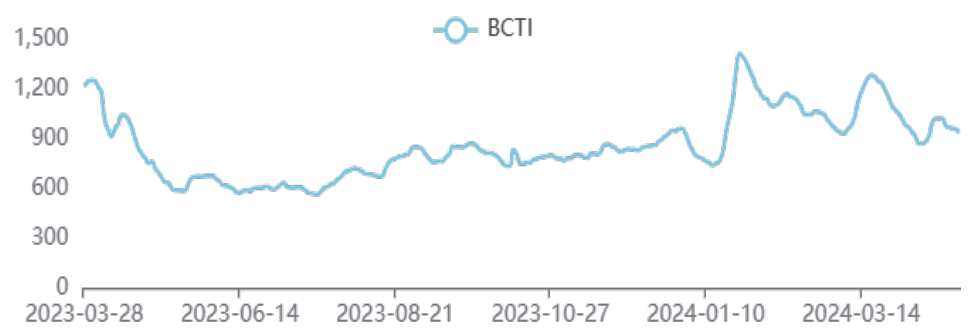
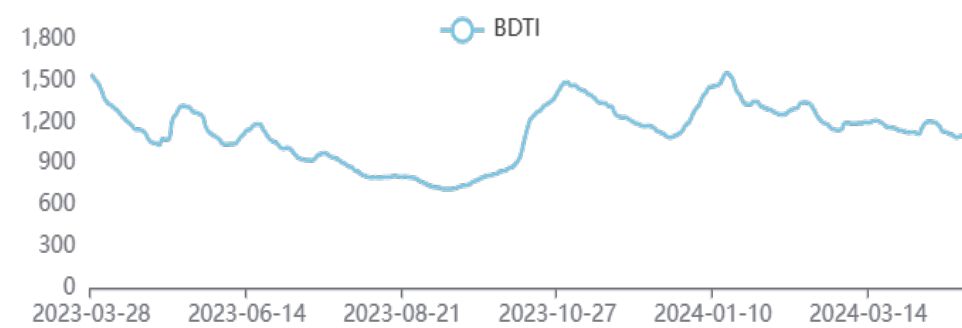
波罗的海干散货指数Baltic Dry Index

Type	PI	WoW	W%	M%	y%
BDI	795	18.0	2.32	28.64	Infinity
BCI	1721	-198.0	-10.32	-5.49	12.04
BPI	1994	79.0	4.13	5.22	Infinity
BSI	751	10.0	1.35	-2.72	Infinity
BHSI	5460	-7.0	-0.13	5.2	Infinity

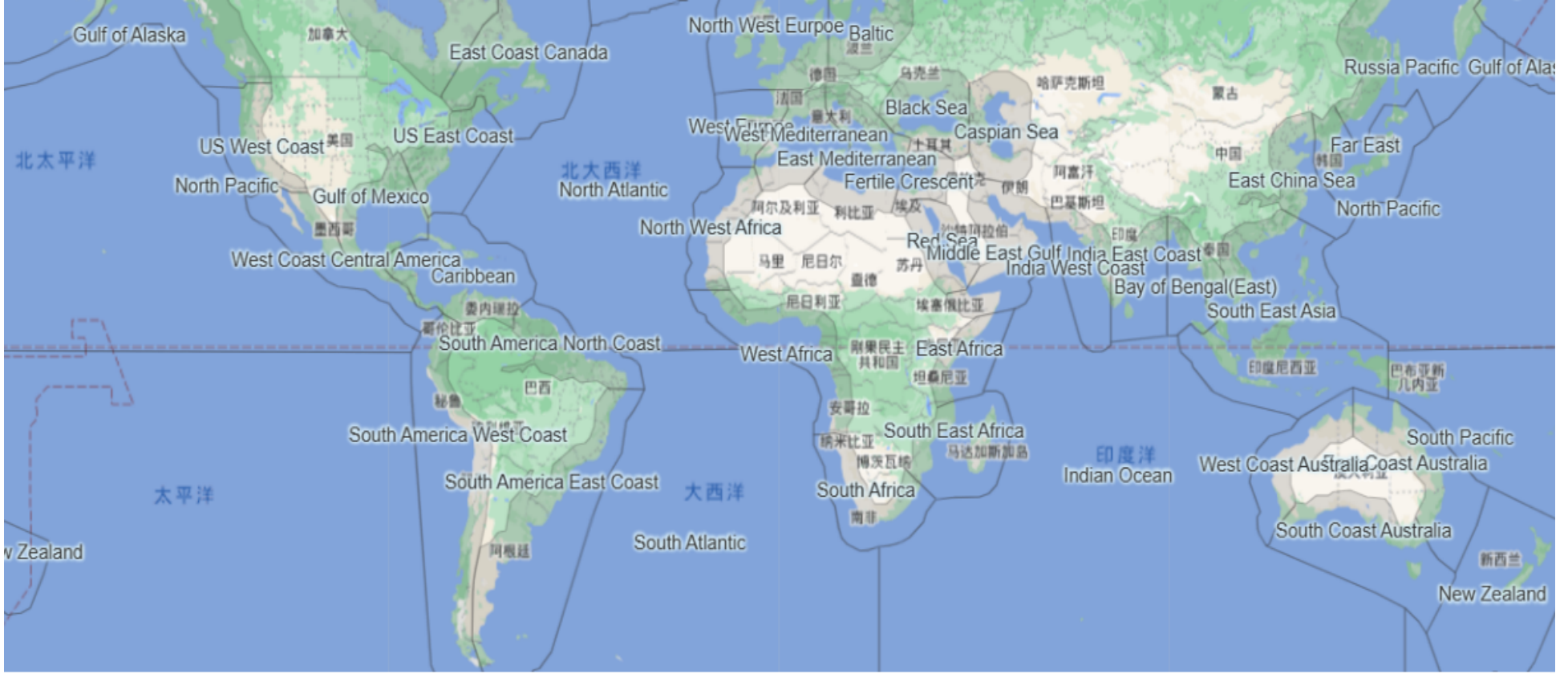


能源运价指数Energy Shipping Index

Type	PI	WoW	W%	M%	y%
BDTI	1495	101.0	7.25	12.32	Infinity
BCTI	1112	-2.0	-0.18	-2.2	4.12
BLNG	2081	3.0	0.14	1.27	Infinity
BLPG	2405	17.0	0.71	-10.33	Infinity



第四部分 运力分布 SUPPLY DISTRIBUTION

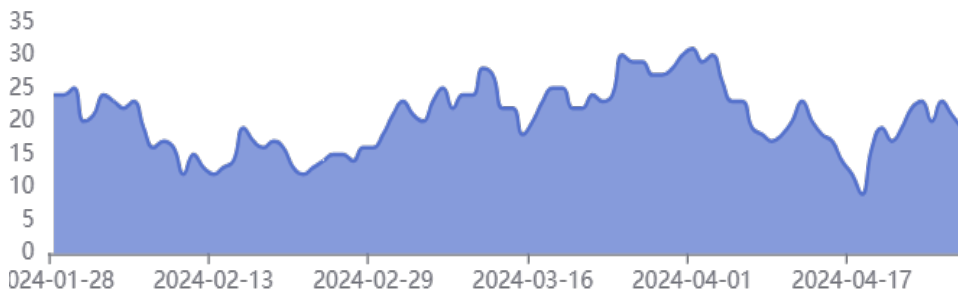


好望角型散货船 Capesize

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.

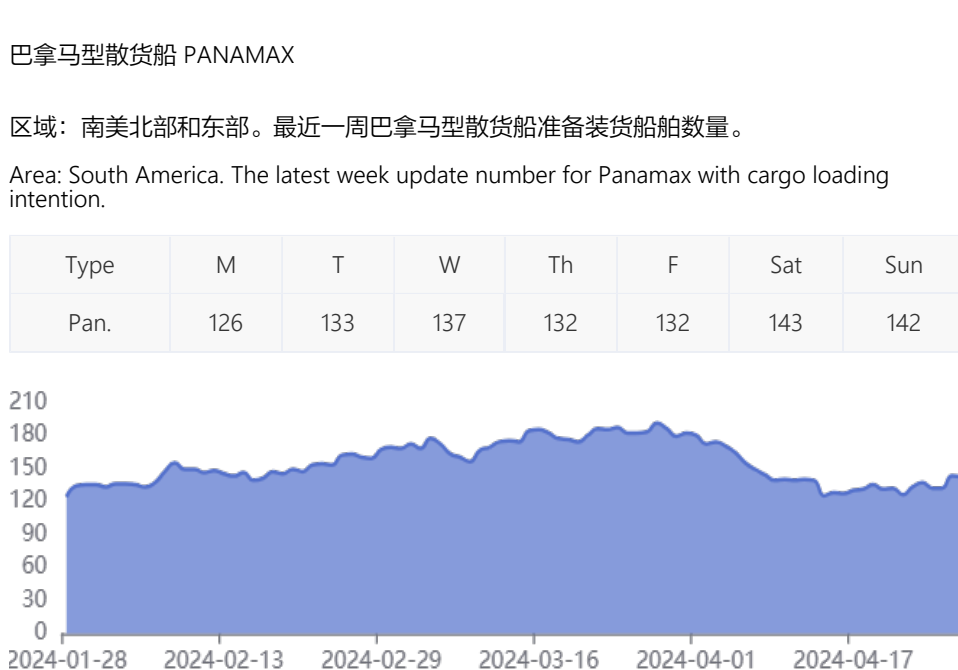
Type	M	T	W	Th	F	Sat	Sun
Cape	19	22	23	20	23	21	19



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.

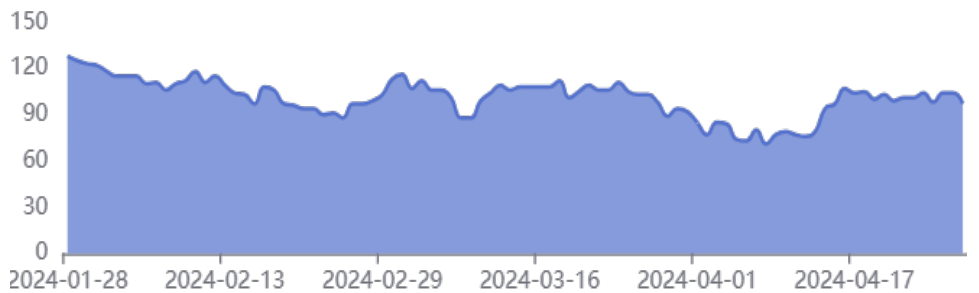
Type	M	T	W	Th	F	Sat	Sun
Cape	26	32	38	32	34	38	36



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.

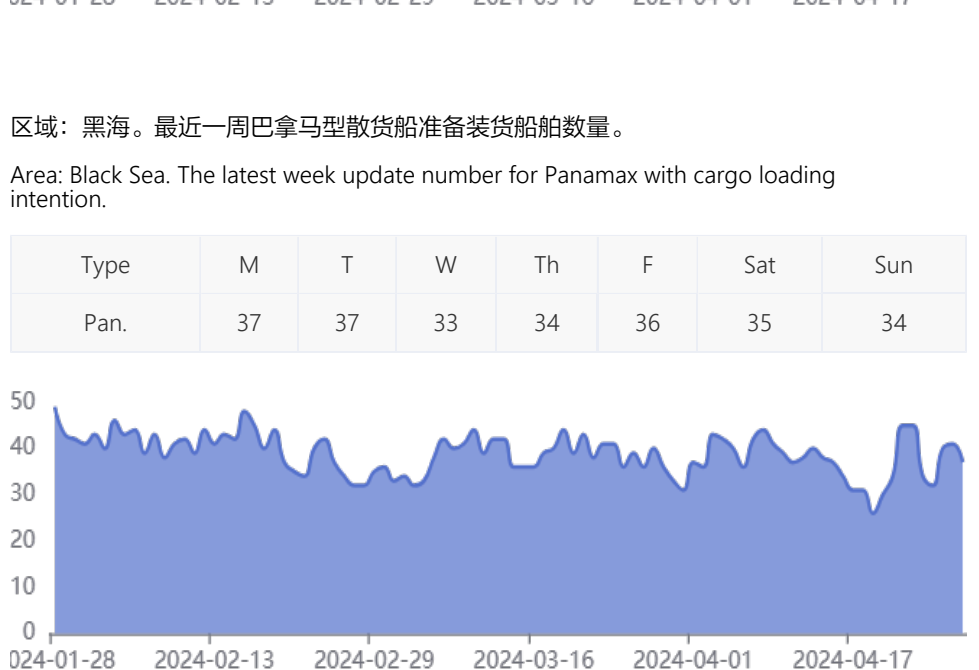
Type	M	T	W	Th	F	Sat	Sun
Cape	101	101	104	98	104	104	97



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.	37	37	33	34	36	35	34

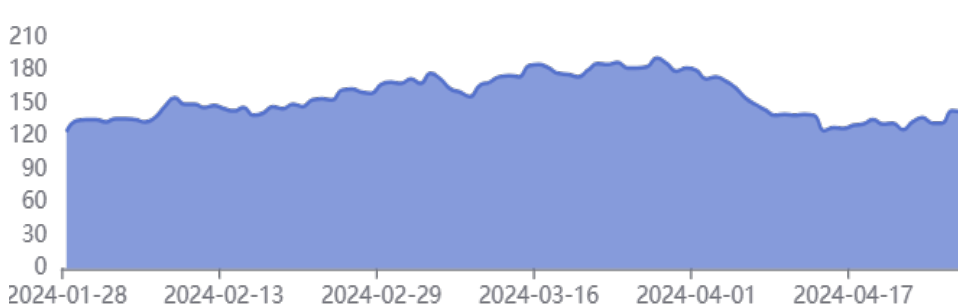


巴拿马型散货船 PANAMAX

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.

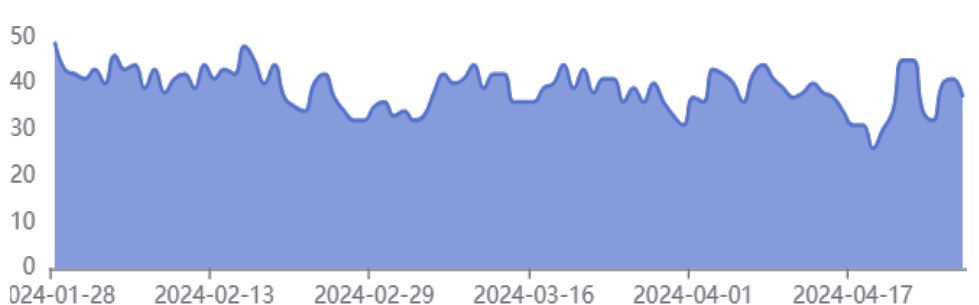
Type	M	T	W	Th	F	Sat	Sun
Pan.	126	133	137	132	132	143	142



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.

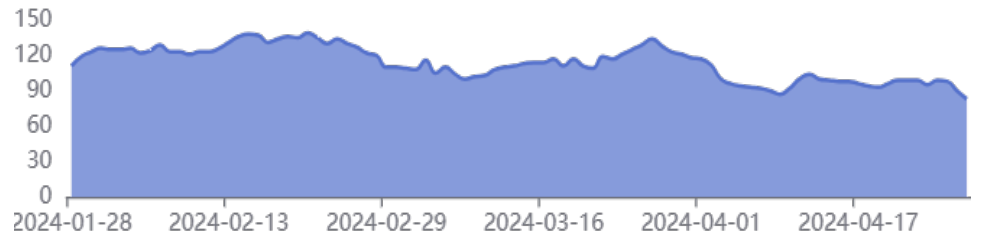
Type	M	T	W	Th	F	Sat	Sun
Pan.	37	37	33	34	36	35	34



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.	99	99	95	99	98	90	83

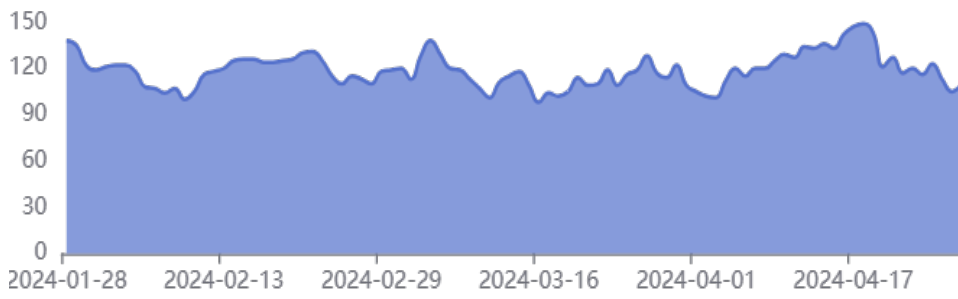


超大灵便型散货 SUPRAMAX

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.

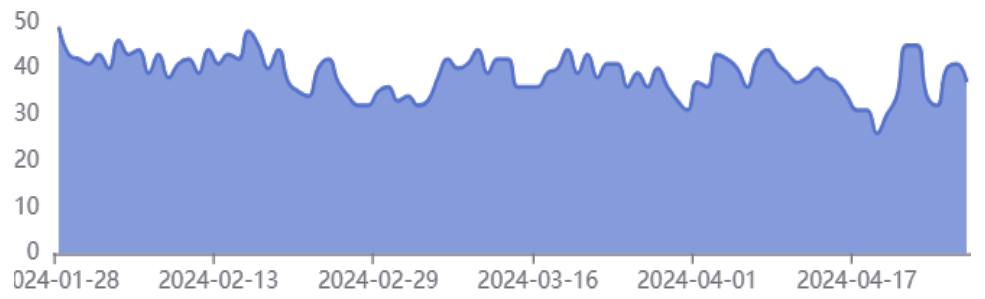
Type	M	T	W	Th	F	Sat	Sun
SMX	117	120	116	123	113	105	110



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.

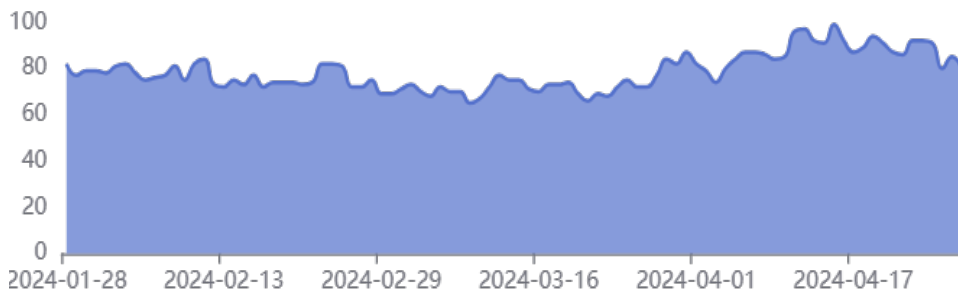
Type	M	T	W	Th	F	Sat	Sun
SMX	45	45	34	32	40	41	37



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.

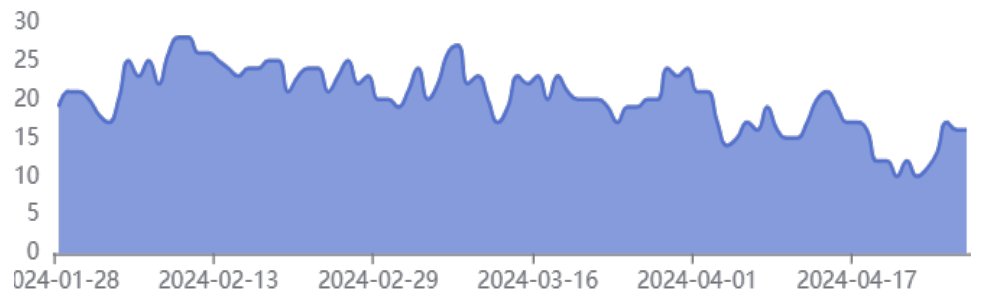
Type	M	T	W	Th	F	Sat	Sun
SMX	12	10	11	13	17	16	16



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.

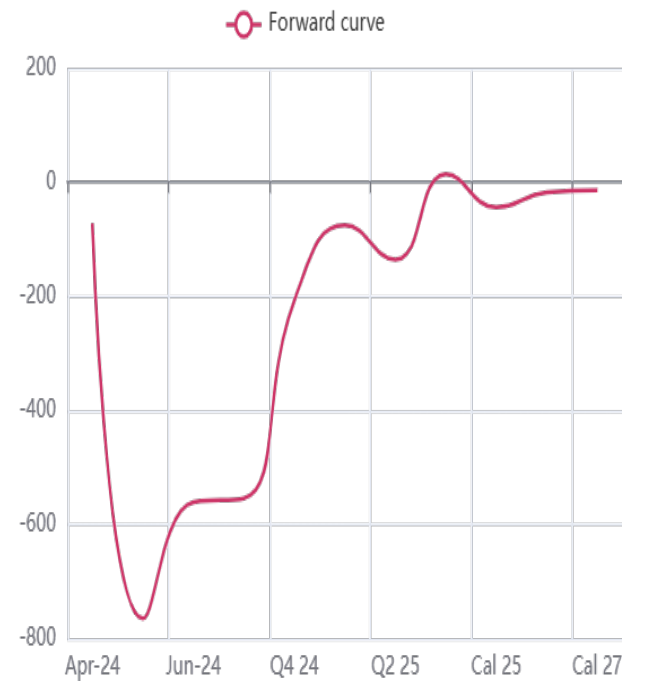
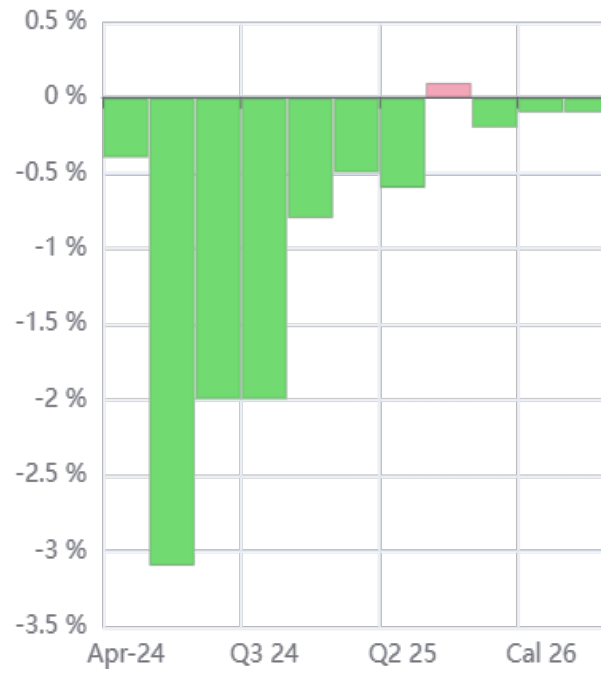
Type	M	T	W	Th	F	Sat	Sun
SMX	86	92	92	91	80	85	80



第五部分 远期运价协议 FFA

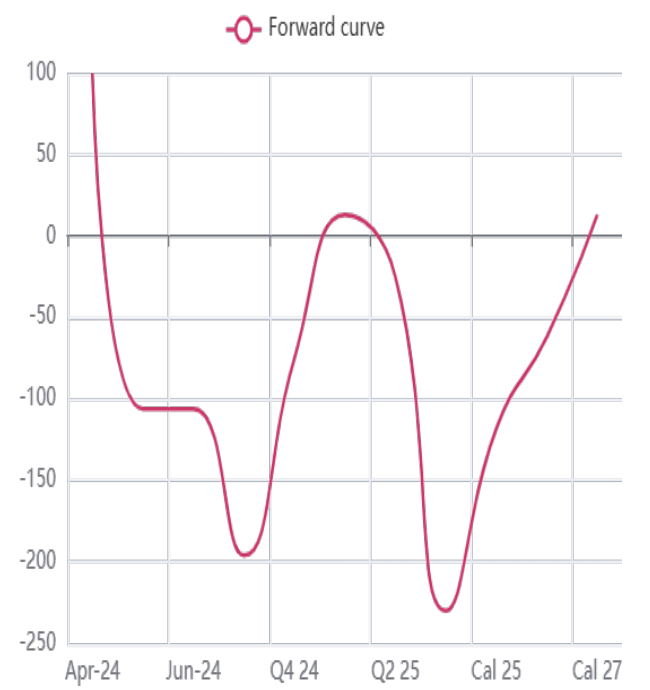
好望角型散货船Capesize

5TC	\$/day	WoW	
Apr-24	20,232.00	-72.0	-0.4 %
May-24	23,589.00	-765.0	-3.1 %
Jun-24	26,957.00	-561.0	-2.0 %
Q3 24	26,724.00	-554.33	-2.0 %
Q4 24	27,039.00	-207.0	-0.8 %
Q1 25	16,171.00	-75.0	-0.5 %
Q2 25	21,050.00	-136.0	-0.6 %
Q3 25	23,721.00	14.0	0.1 %
Cal 25	21,199.75	-44.0	-0.2 %
Cal 26	20,139.00	-18.0	-0.1 %
Cal 27	19,318.00	-14.0	-0.1 %



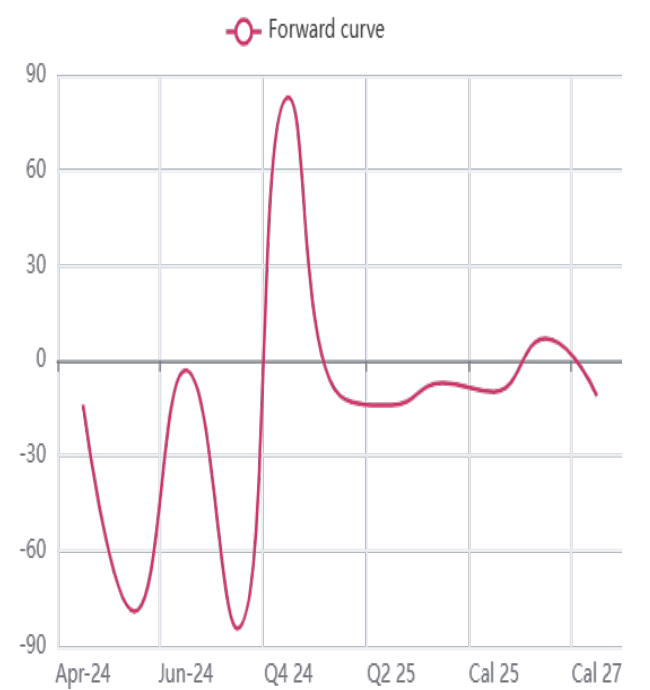
灵便型散货船Handysize

7TC	\$/day	WoW	
Apr-24	13,438.00	100.0	0.7 %
May-24	14,038.00	-106.0	-0.7 %
Jun-24	14,000.00	-106.0	-0.8 %
Q3 24	13,825.33	-196.0	-1.4 %
Q4 24	13,325.00	-75.0	-0.6 %
Q1 25	11,138.00	13.0	0.1 %
Q2 25	12,150.00	-25.0	-25.0
Q3 25	12,458.00	-230.0	-1.8 %
Cal 25	12,051.00	-118.0	-1.0 %
Cal 26	11,763.00	-62.0	-0.5 %
Cal 27	11,588.00	13.0	0.1 %



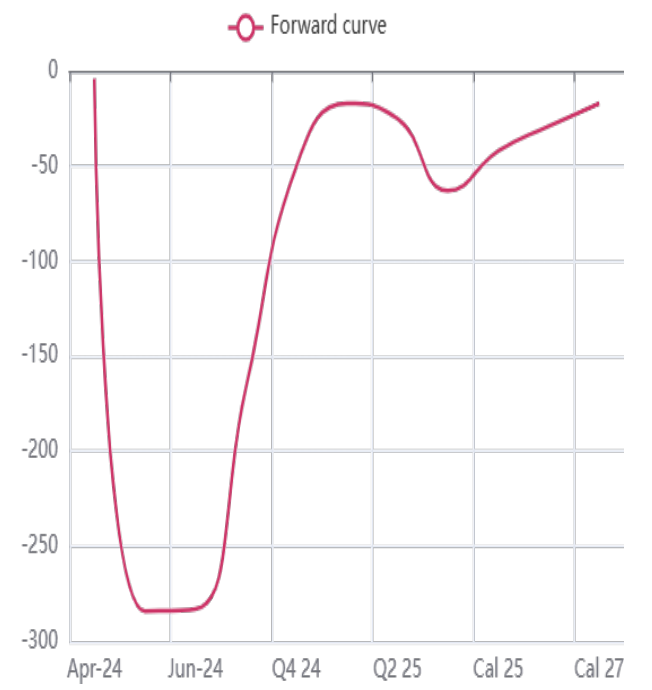
巴拿马型散货船Panamax

4TC	\$/day	WoW	
Apr-24	14,861.00	-14.0	-0.1 %
May-24	15,657.00	-79.0	-0.5 %
Jun-24	15,954.00	-3.0	0.0 %
Q3 24	15,687.00	-84.33	-0.5 %
Q4 24	14,929.00	83.0	0.6 %
Q1 25	12,625.00	-11.0	-0.1 %
Q2 25	13,979.00	-14.0	-0.1 %
Q3 25	13,736.00	-7.0	-0.1 %
Cal 25	13,420.75	-9.75	-0.1 %
Cal 26	12,643.00	7.0	0.1 %
Cal 27	12,300.00	-11.0	-0.1 %



超大灵便型散货船Supramax

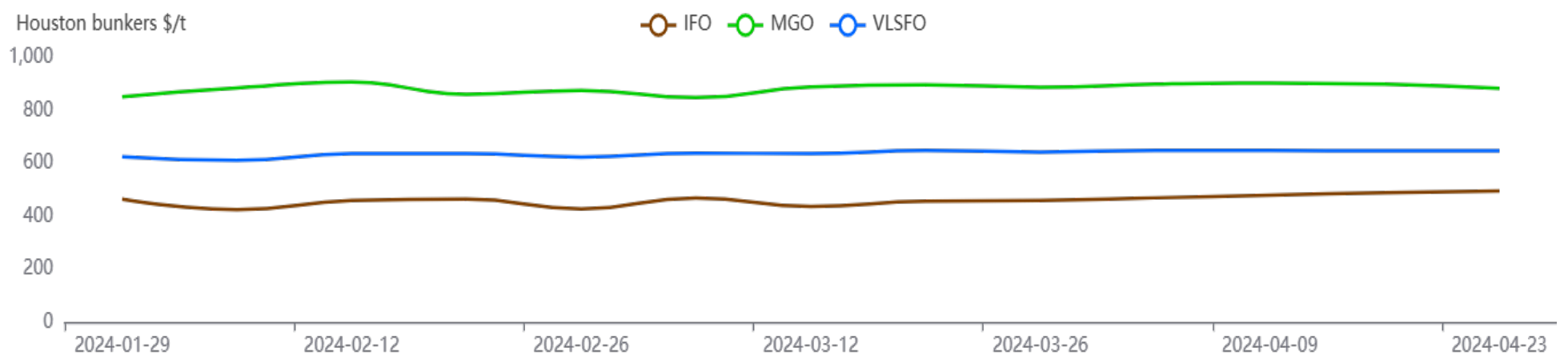
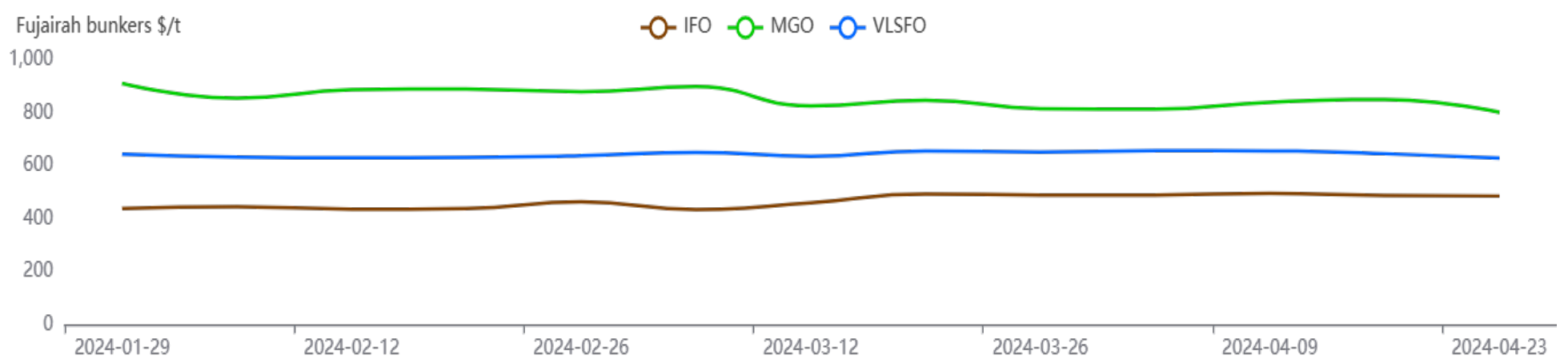
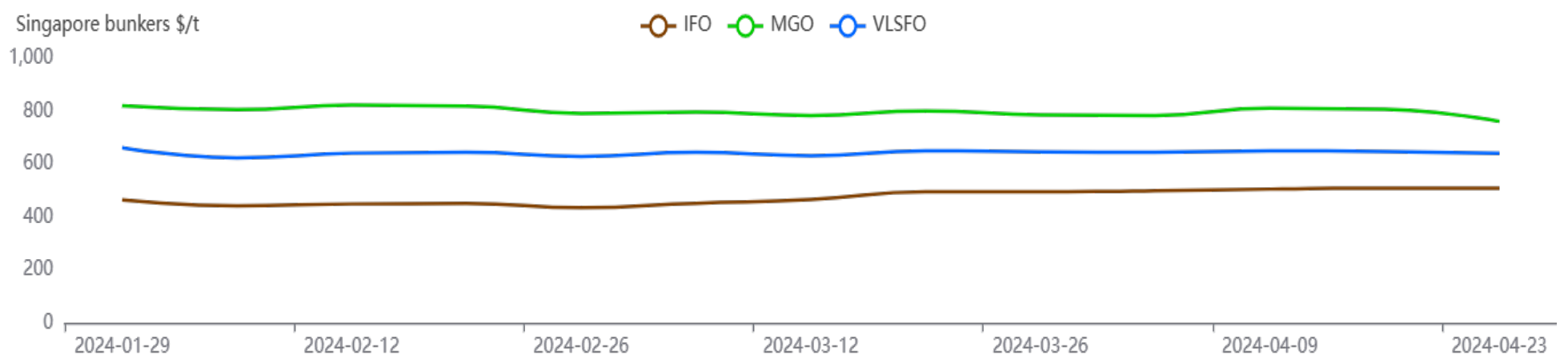
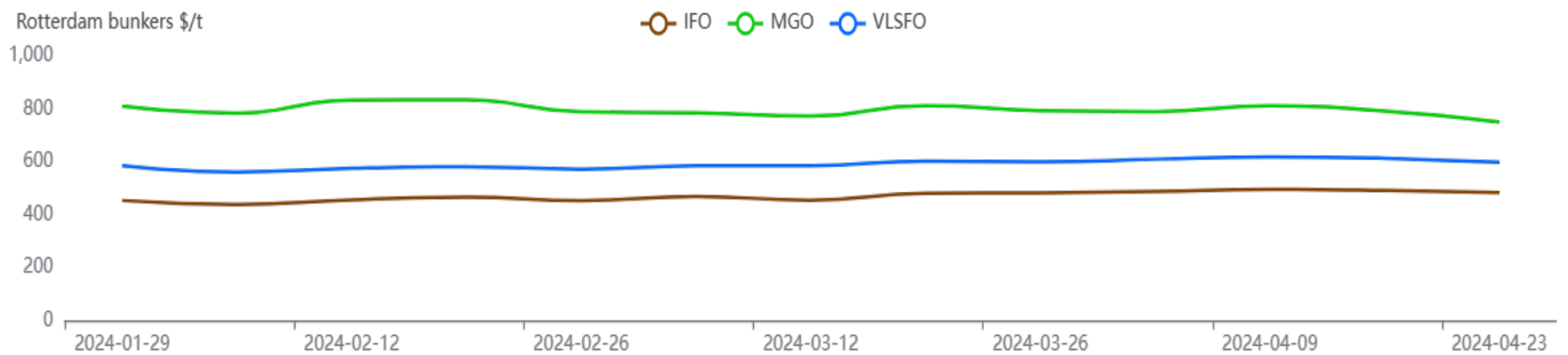
10TC	\$/day	WoW	
Apr-24	14,846.00	-4.0	0.0 %
May-24	15,754.00	-284.0	-1.8 %
Jun-24	15,525.00	-283.0	-1.8 %
Q3 24	15,100.00	-166.67	-1.1 %
Q4 24	14,329.00	-50.0	-0.3 %
Q1 25	12,029.00	-17.0	-0.1 %
Q2 25	13,250.00	-25.0	-0.2 %
Q3 25	13,469.00	-63.0	-0.5 %
13,054.25	Cal 25	-42.0	-0.3 %
Cal 26	12,329.00	-29.0	-0.2 %
Cal 27	12,033.00	-17.0	-0.1 %



第六部分 燃油价格 BUNKER PRICE

MP	LO	HO	MO	SP	WoW	W%	M%
zhoushan	648.0	514.5	807.5	133.5	-1.0	-0.74	-5.65
Singapore	641.0	509.0	762.0	132.0	-6.0	-4.35	-12.58
Rotterdam	599.0	484.5	751.0	114.5	-7.5	-6.15	-2.14
Fujairah	629.5	486.0	802.5	143.5	-15.0	-9.46	-11.69
Houston	647.5	495.5	883.5	152.0	-6.5	-4.1	-16.71

(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	1.0	0.51	0.0	-23.83
Maize		203.0	4.0	2.01	2.53	-31.59
Soybeans		218.0	-1.0	-0.46	-3.11	-22.49
Rice		246.0	-1.0	-0.4	-1.99	22.55
Barley		208.0	0.0	0.0	0.48	-22.87
Energy		Index	+/-	Weekly	Monthly	YTD
Crude Oil	USD/Bbl	80.83	-4.05	-4.77	-1.46	0.3
Brent	USD/Bbl	85.92	-3.8	-4.24	-0.99	1.62
Natural Gas	USD/MMBtu	1.74	-0.01	-0.57	-4.4	-23.35
Gasoline	USD/Gal	2.68	-0.11	-3.94	-2.55	-2.9
Heating Oil	USD/Gal	2.51	-0.16	-5.99	-5.99	-3.83
Ethanol	USD/Gal	1.68	0.02	1.2	5.66	-31.43
Naphtha	USD/T	684.85	-3.52	-0.51	-3.68	-1.12
Propane	USD/Gal	0.81	-0.01	-1.22	-1.22	-1.22
Uranium	USD/Lbs	89.3	0.55	0.62	5.06	75.1
Methanol	CNY/T	2617.0	61.0	2.39	3.81	6.9
TTF Gas	EUR/MWh	29.91	-0.67	-2.19	7.4	-27.96
UK Gas	GBP/thm	74.85	-0.92	-1.21	4.54	-24.47
Industrial		Index	+/-	Weekly	Monthly	YTD
Copper	USD/Lbs	4.5	0.21	4.9	12.5	10.29
Coal	USD/T	141.75	8.0	5.98	9.93	-24.2
Steel	CNY/T	3594.0	158.0	4.6	1.27	-9.13
Iron Ore	USD/T	108.25	2.2	2.07	-2.04	-8.26
Aluminum	USD/T	2667.5	122.5	4.81	14.73	10.39
Lithium	CNY/T	110500.0	N/A	N/A	N/A	N/A
Metals		Index	+/-	Weekly	Monthly	YTD
Gold	USD/t.oz	2356.2	5.3	0.23	8.07	17.63
Silver	USD/t.oz	27.7	-0.6	-2.12	12.6	10.1
Platium	USD/t.oz	937.7	-42.7	-4.36	3.81	-11.41
Currencies		Index	+/-	Weekly	Monthly	YTD
EUR/USD		1.07	0.0	0.0	-0.93	-2.73
USD/CNY		7.25	-0.01	-0.14	0.0	5.38

第八部分 本周话题 WEEKLY TOPIC



红火的海上汽车运输市场

最近几年海上汽车运输是航运业最热的领域之一。背后强劲的国际间汽车贸易是主要驱动因素，此外一些区域性问题和动荡也放大了汽车船需求。

近两年来，海运汽车贸易表现出色，2021年汽车运输量超过2200万水平，2022年汽车运输量超过2400万水平，2023年汽车运输量接近2900万辆，2023年相对2021年增长了29%。2024年第一季度同比增长接近10%，其中中国汽车的出口从2021年160万辆到2023年超过440万辆，3年增长了1.7倍。

强劲的汽车贸易量刺激了船舶需求。中国对欧洲电动汽车的长途出口，红海航线的动荡和巴拿马运河因干旱的排队，这些综合因数大大增加了全球汽车船海里的运输水平，但是全球汽车船舶实际增长十分有限，这三年增加的海上汽车运输量只是略微增加了1.5%左右的水平，这些综合原因可能是导致汽车运输船的期租水平在近3年增长了数倍的原因。按6500车位的汽车船来说，2021年这种船型平均期租租金大概在25000美金每天的水平，到2023年的平均水平已经超过110000美金每天，租金水平翻了3倍。

虽然近三年海上汽车运输市场红红火火，但是该运输市场前景依然风云莫测并且复杂，是全球汽车贸易的一个备受关注的关键词。目前从传统红海苏伊士运河改道好望角的船只，理论上使汽车运输船的需求增加约10%，但是航路由正常化时，这种提升可能会消失。除了红海局势的破坏，其他因素也备受关注，比如之前大部分汽车进口到巴尔的摩(美国第一大汽车港口-约占美国进口的15%)目前因为断桥阻挡航路，汽车进口正被重

新定向到其他东海岸码头，预计在主通道今年5月底前不会恢复正常。在其它方面，随着欧盟反补贴调查接近尾声，中欧贸易为关注焦点。欧盟反补贴调查可能会出台新的关税。这些很可能对中国电动汽车出口造成影响。

总体来说，激增的汽车贸易量和运输航线的转变推动了最近几年的汽车运输市场。随着市场周期的下一个阶段逐渐演变，未来汽车运输市场的上下起伏有很多点值得关注的地方。

Seaborne car transport has been one of the hottest areas in the shipping industry in recent years. Behind the strong international automobile trade is the main driving factor, in addition to some regional problems and turbulence also magnifies the demand for car carriers.

In the past two years, the maritime automobile trade has performed well, with vehicle transport exceeding 22 million levels in 2021, 24 million levels in 2022, and nearly 29 million vehicles in 2023, an increase of 29% in 2023 relative to 2021. In the first quarter of 2024, the year-on-year growth was close to 10%, of which the export of Chinese cars from 1.6 million in 2021 to more than 4.4 million in 2023, an increase of 1.7 times in 3 years.

Strong car trade has spurred demand for ships. China's long-distance export of electric vehicles to Europe, the turbulence of the Red Sea route and the queuing of the Panama Canal due to drought, these combined factors have greatly increased the level of global car and ship transport by sea, but the actual growth of global car and ship is very limited, the increase in the volume of sea car transport in the past three years is only a slight increase of about 1.5%. These combined reasons may be the reason why the time charter level of car carriers has increased several times in the past three years. According to the 6,500 car boat, the average term rental of this type of boat in 2021 is about 25,000 US dollars per day, and by 2023, the average level has exceeded 110,000 US dollars per day, and the rental level has tripled.

Although the maritime automobile transportation market has been booming in the past three years, the prospects of this transportation market are still unpredictable and complex, and it is a key topic of concern in the global automobile trade. The current diversion of ships from the traditional Suez Canal in the Red Sea to the Cape of Good Hope theoretically boosts demand for car carriers by about 10 percent, but that boost could disappear when the route is normalized. In addition to the disruption in the Red Sea situation, other factors are also being concerned, such as the majority of car imports to Baltimore (the number one car port in the United States - about 15% of US imports) are now being redirected to other East Coast terminals due to the broken bridge blocking the shipping route, and it is not expected to return to normal before the end of May this year. Elsewhere, trade with China was in focus as the EU's anti-subsidy investigation drew to a close. The EU's anti-subsidy investigation could lead to new tariffs. These are likely to have an impact on China's electric vehicle exports.

Overall, surging automobile trade volumes and shifts in transportation routes have driven the seaborne car transportation market in recent years. As the next phase of the market cycle gradually evolves, there are many points to watch for the ups and downs of the future motor transport market.