



2025年 第24周市场周报

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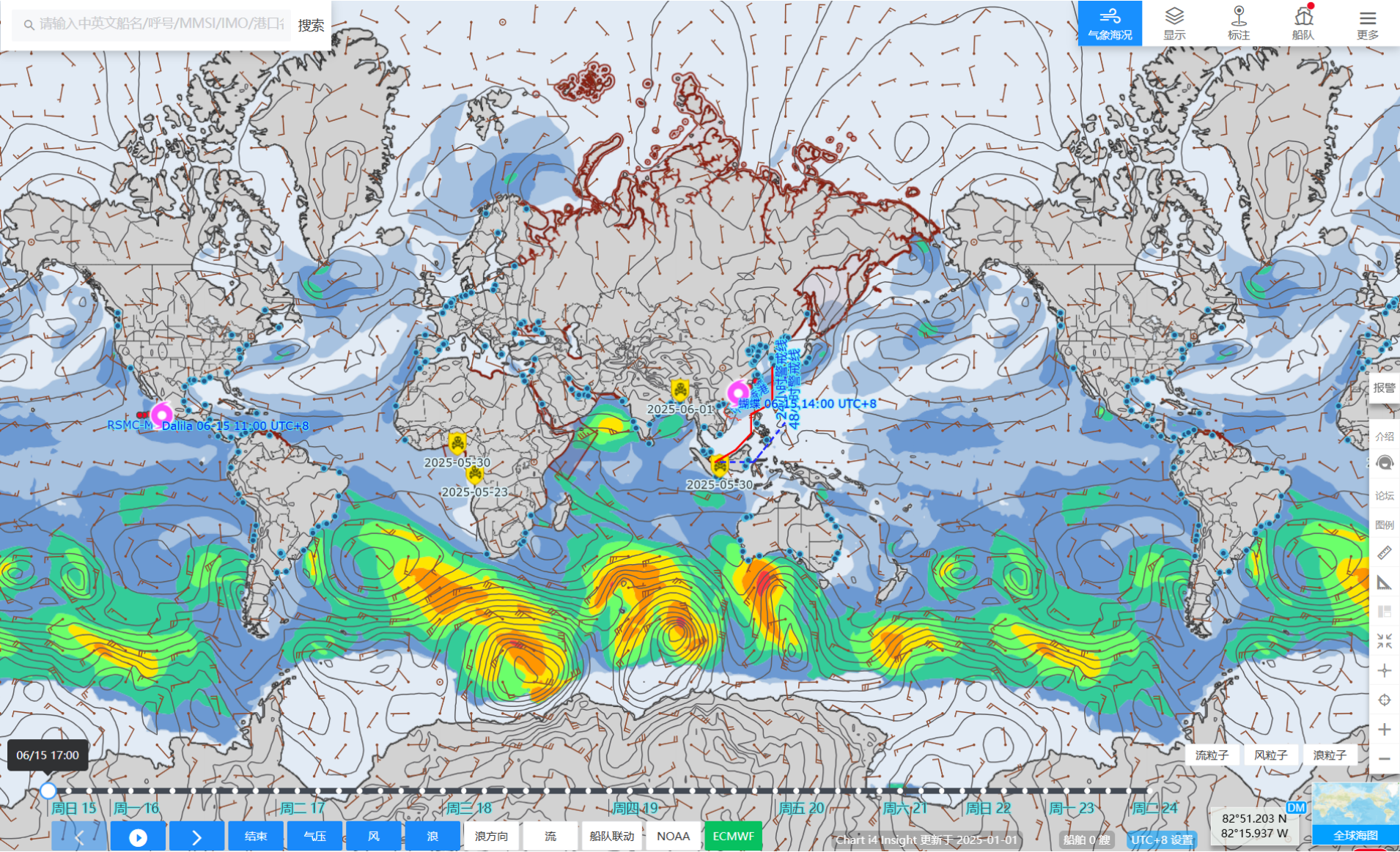
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第八部分

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455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 455 navigational warnings in effect around the ocean on hiFleet with the Far East being the majority. Please pay attention to the navigational warnings in relevant waters.

航海气象 Meteorology

未来一周中国渤海海域风力3-4级，轻浪；黄海风力4-5级，中浪；东海风力6-4级，上半周有大浪；台湾海峡7-4级风，前半周有大浪；南海大部海域风力5-4级，中浪。太平洋北部和北大西洋的低气压开始减弱。The coming week the wind in Bohai Sea is breeze with slight sea. Wind in Yellow Sea is breeze with moderate sea. And China East Sea will become moderate with rough sea in the early. The wind in the Taiwan Strait will become ease with rough sea in the early. In most of the South China Sea the wind is moderate with moderate sea. The low pressure activities become small and gentle both in North of Pacific and Atlantic.

海盗事件 Piracy

6月11日，新加坡海峡。六名持枪和持刀的劫匪登上了一艘正在航行的散货船，并进入了机舱。警报响起，船员们聚集起来，结果劫匪带着偷来的发动机备件逃跑了。这一事件被报告给了新加坡VTIS，VTIS随后派遣了警察进行调查。11.06.2025: 2000 UTC: Posn: 01:06.3N – 103:44.5E, Singapore Straits. Six robbers armed with guns and knives boarded a bulk carrier underway and entered the engine room. Alarm raised and crew mustered resulting in the robbers escaping with stolen engine spares. The incident was reported to the Singapore VTIS, who then dispatched the police for investigation.

海上事件 Marine Incidents

6月11日，一艘船龄超过28岁的杂货船“RUN FU 3”轮在印度洋海域发生弃船事件，据HIFLEET气象数据显示，弃船当时风力达5级，浪高接近3米。HIFLEET航运大数据显示，“RUN FU 3”轮1997年建造，挂巴拿马旗，5月20日从天津出发，经过新加坡，原定7月5日前往西非洛美港。A general cargo ship "RUN FU 3", which is over 28 years old, abandoned the vessel in the Indian Ocean. According to HIFLEET's meteorological data, the wind force reached level 5 at the time of abandonment and the wave height was close to 3 meters. HIFLEET's shipping big data shows that the "RUN FU 3" was built in 1997, flies the Panamanian flag, set off from Tianjin on May 20th, passed through Singapore, and was originally scheduled to head for the Lome Port in West Africa on July 5th.

其它 Others

没有 Nil

备注 Remark

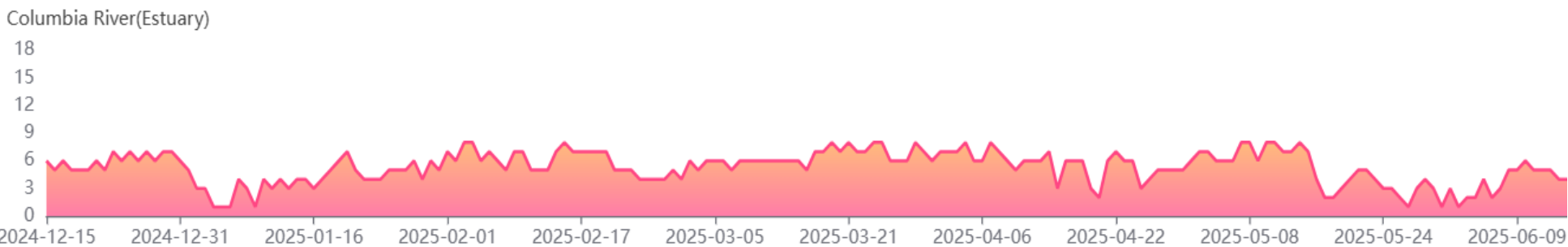
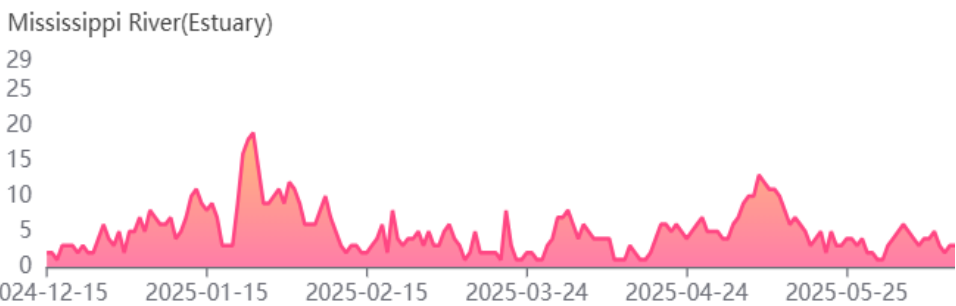
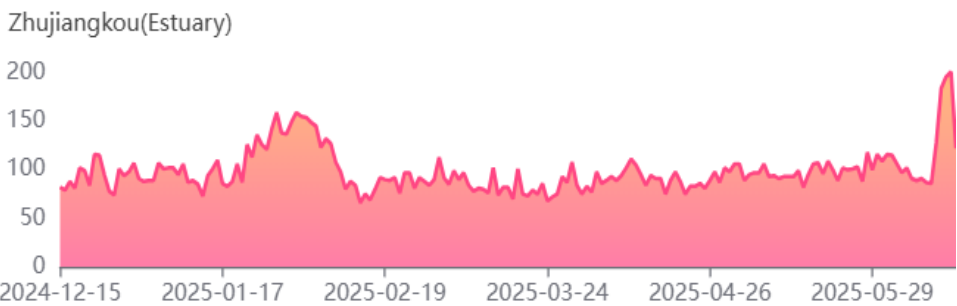
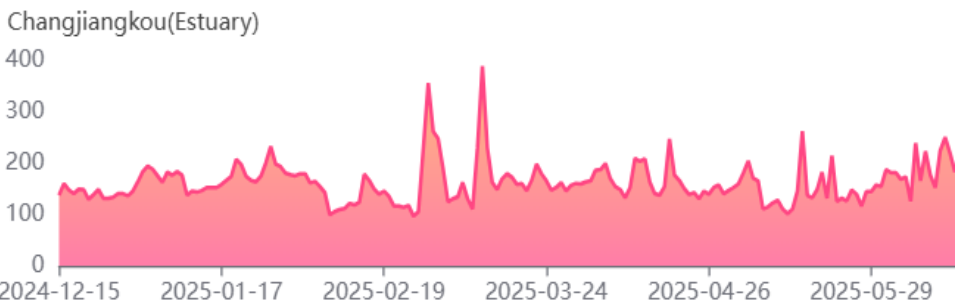
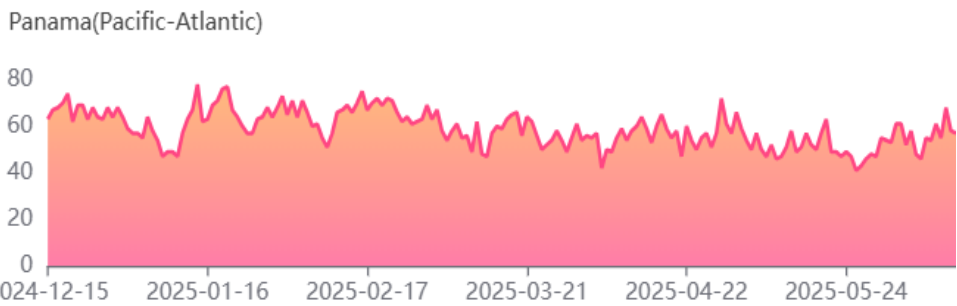
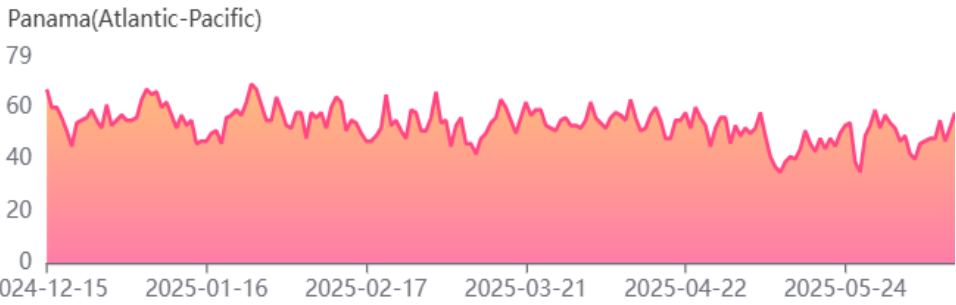
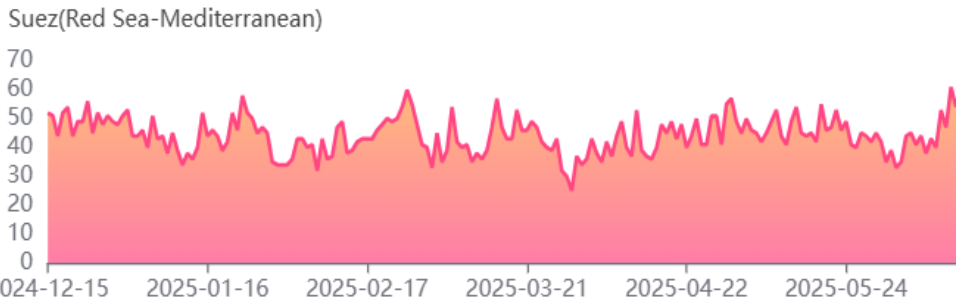
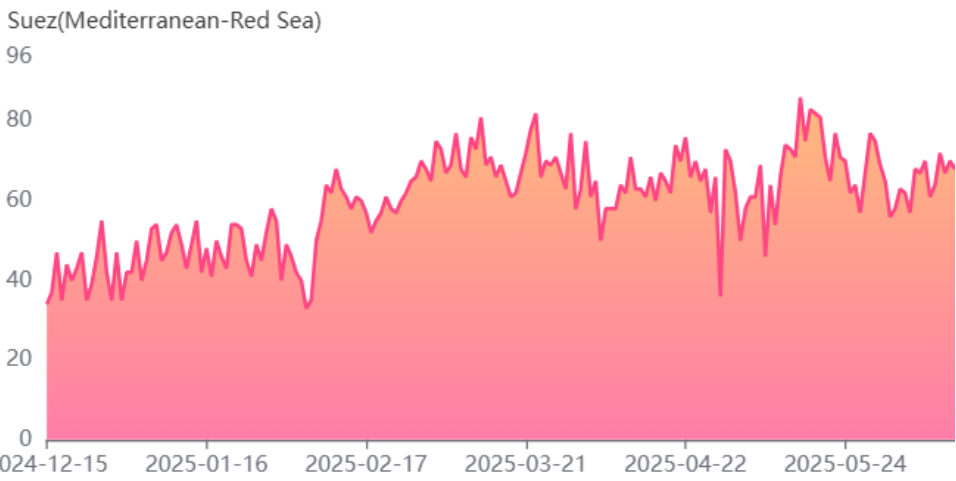
本报告数据截止时间为2025年6月15日北京时间17点；所有数据和或观点仅供参考，在任何情况下本公司及其员工不承担任何风险。The data deadline for this report is Beijing time 17 hours on June 15th of 2025; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

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	54	1289	64	-61
Miss.Riv.	3	100	-4	-101
CJK	183	4932	172	650
Pa.Atlan.	58	1414	14	-10
Colum.Riv.	4	99	17	-68
Suez.Med.	68	1956	43	30
Pa.Pac.	57	1532	21	-43
ZJK	122	3249	288	537

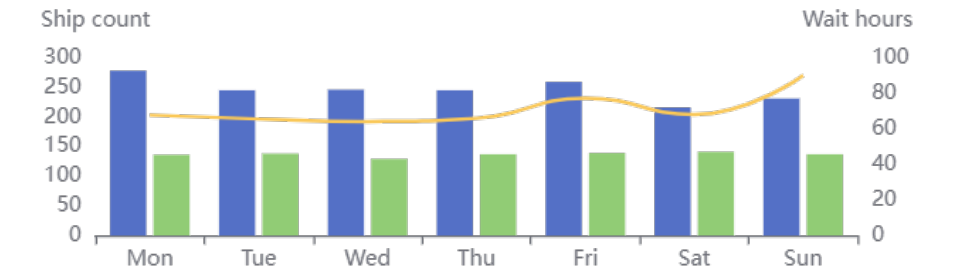
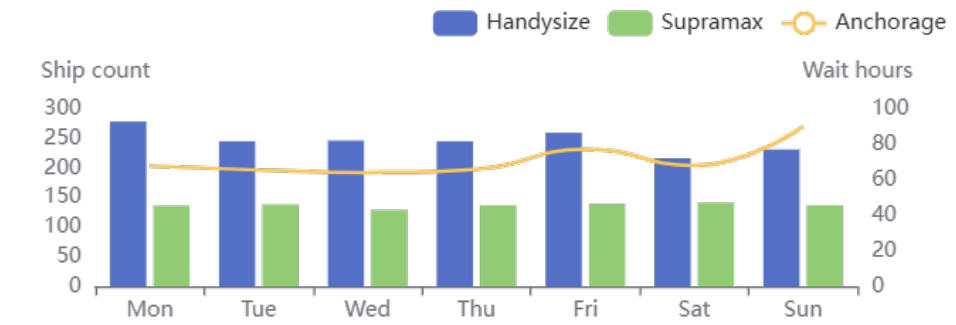


(P.N-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

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

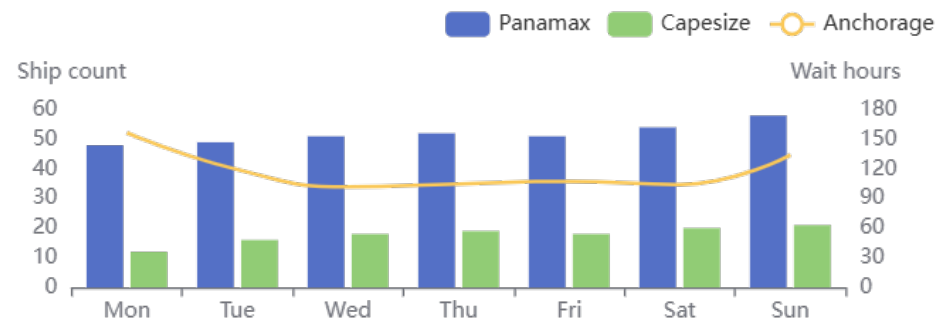
Type	M	T	W	Th	F	Sat	Sun
HDY	278	245	246	245	259	216	231
SMX	136	138	129	137	139	141	137
WT.h.	67.7	65.5	64.1	65.9	77.2	68	90



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

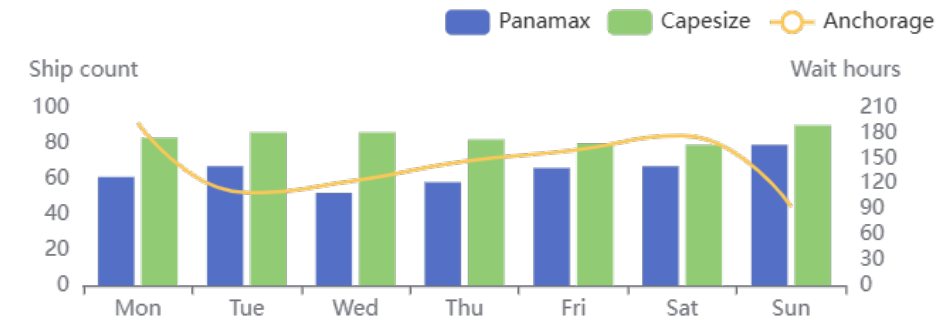
Type	M	T	W	Th	F	Sat	Sun
Pan.	48	49	51	52	51	54	58
Cap	12	16	18	19	18	20	21
WT.h.	156.6	119.3	101.8	104.8	107.4	104.2	134



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

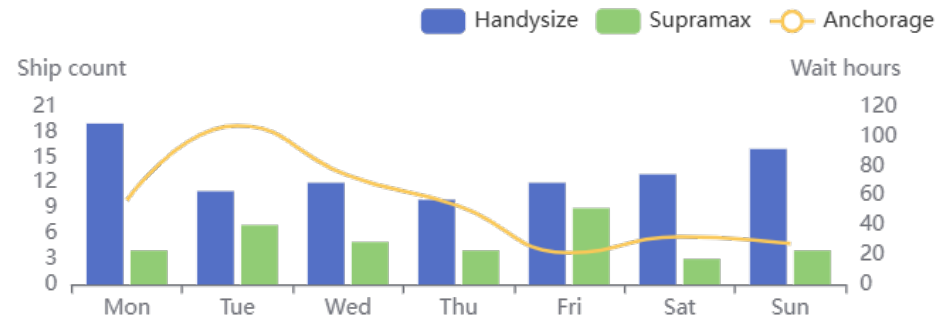
Type	M	T	W	Th	F	Sat	Sun
Pan.	61	67	52	58	66	67	79
Cap	83	86	86	82	80	79	90
WT.h.	191.7	109.5	124	146.6	159.6	177	93



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

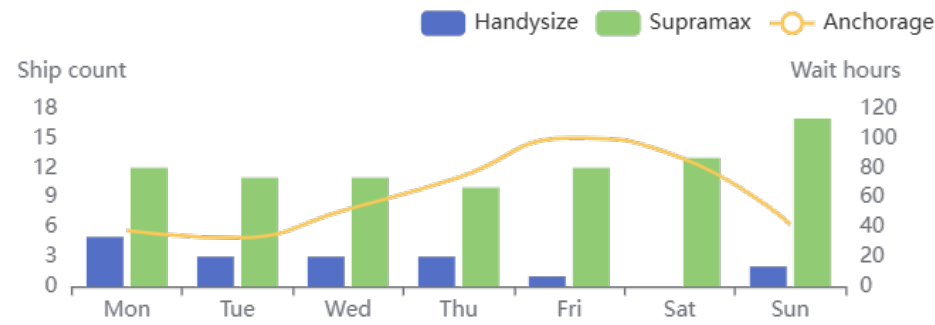
Type	M	T	W	Th	F	Sat	Sun
HDY	19	11	12	10	12	13	16
SMX	4	7	5	4	9	3	4
WT.h.	56.9	107.15	73.5	52.9	21.4	32.2	27.5



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

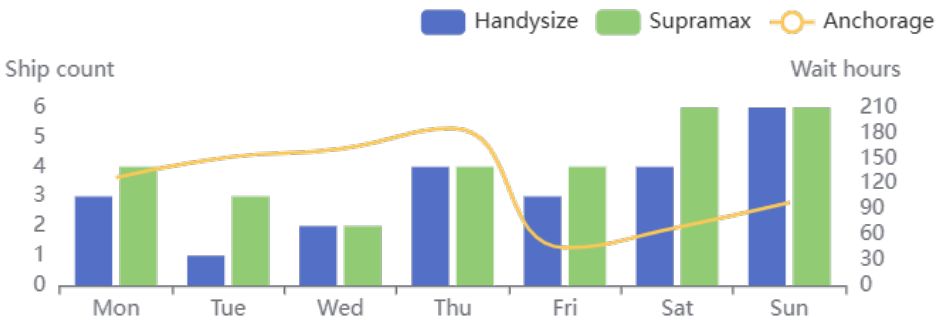
Type	M	T	W	Th	F	Sat	Sun
HDY	5	3	3	3	1	0	2
SMX	12	11	11	10	12	13	17
WT.h.	37.6	32.95	52.2	73.6	100.2	87.3	42



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

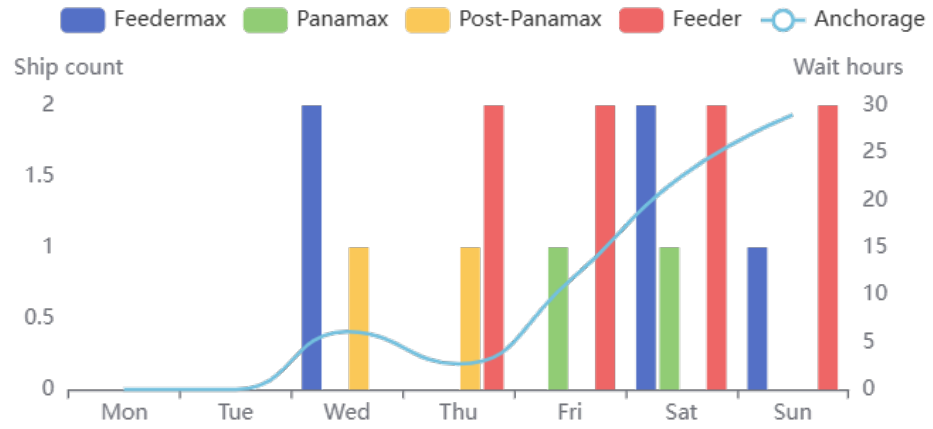
Type	M	T	W	Th	F	Sat	Sun
HDY	3	1	2	4	3	4	6
SMX	4	3	2	4	4	6	6
WT.h.	127.4	151.4	161.45	185.45	44.6	68.6	98



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

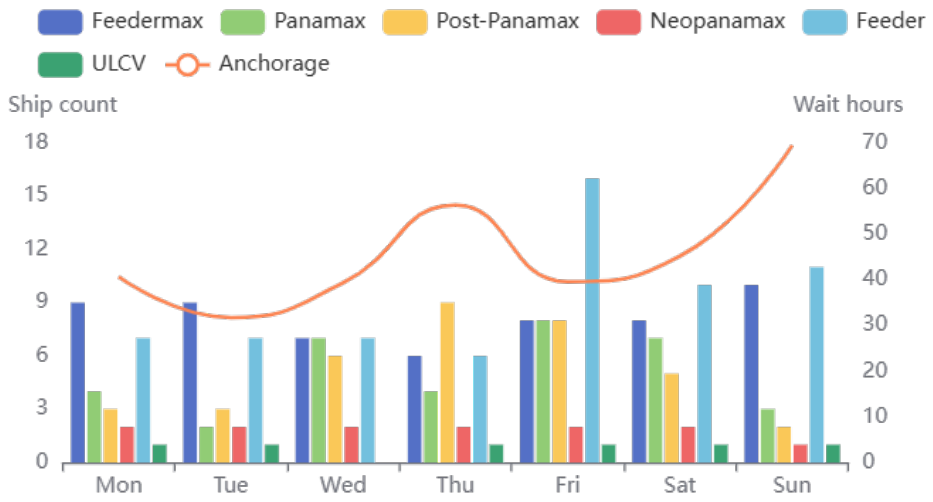
Type	M	T	W	Th	F	Sat	Sun
F.ma.	0	0	2	0	0	2	1
Pan.	0	0	0	0	1	1	0
PPx	0	0	1	1	0	0	0
NPx	0	0	0	0	0	0	0
Fd	0	0	0	2	2	2	2
WT.h.	0.0	0.0	6.1	2.7	11.5	22.5	29
Ulcw	0	0	0	0	0	0	0



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

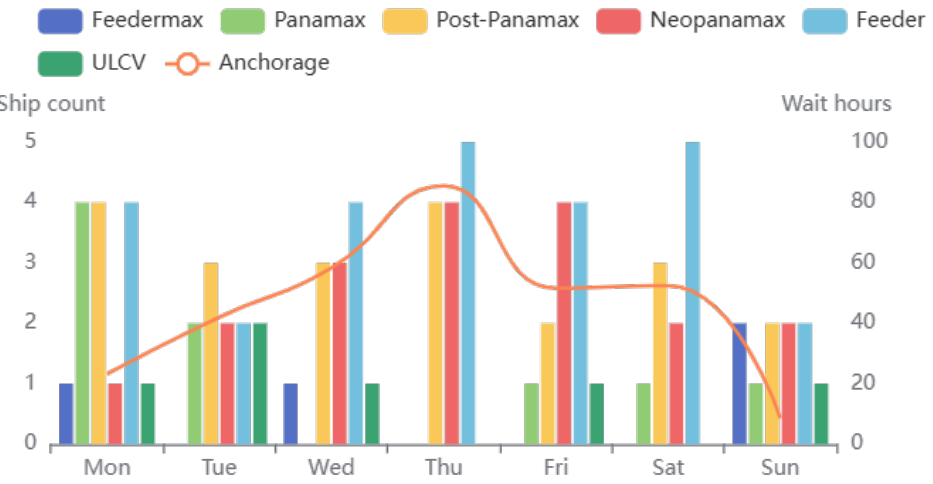
Type	M	T	W	Th	F	Sat	Sun
F.ma.	9	9	7	6	8	8	10
Pan.	4	2	7	4	8	7	3
PPx	3	3	6	9	8	5	2
NPx	2	2	2	2	2	2	1
Fd	7	7	7	6	16	10	11
Ulcw	1	1	0	1	1	1	1
WT.h.	40.7	31.75	39.4	56.4	39.6	45.2	69.5



最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

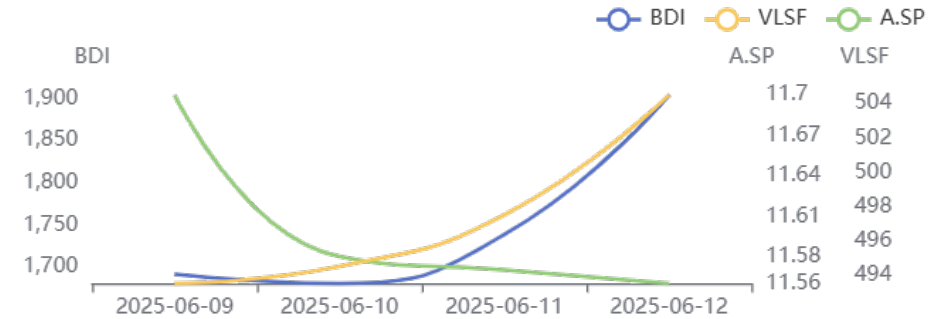
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

Type	M	T	W	Th	F	Sat	Sun
F.ma.	1	0	1	0	0	0	2
Pan.	4	2	0	0	1	1	1
PPx	4	3	3	4	2	3	2
NPx	1	2	3	4	4	2	2
Fd	4	2	4	5	4	5	2
Ulcw	1	2	1	0	1	0	1
WT.h.	23.2	42	58.35	85.5	51.65	52.5	8.5



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

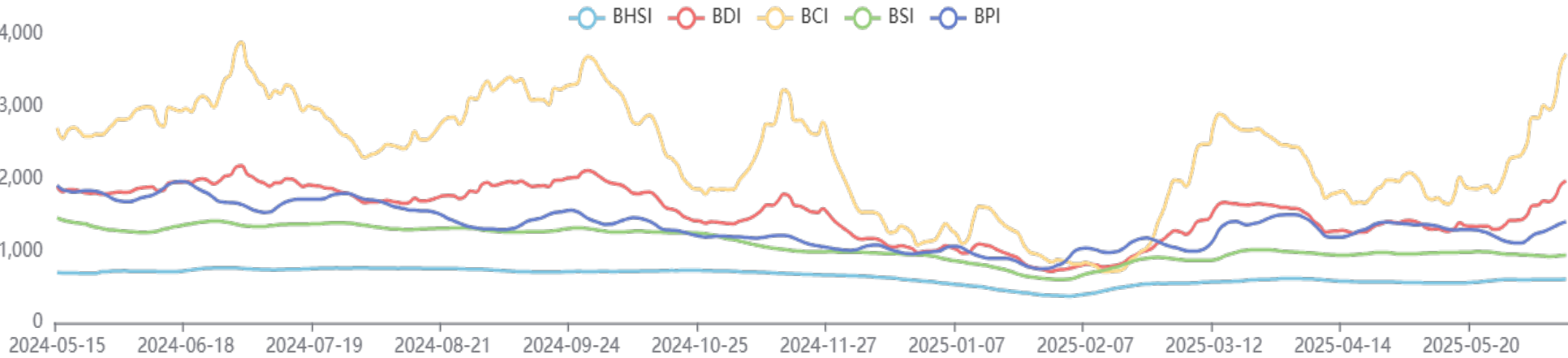
Type	M	T	W	Th	F	Sat	Sun
BDI	1264	1300	1337	1375			
VLSF	493.50	494.50	497.50	504.50			
A.SP	11.7	11.58	11.57	11.56	11.59	11.62	



第三部分 航运市场 SHIPPING MARKET

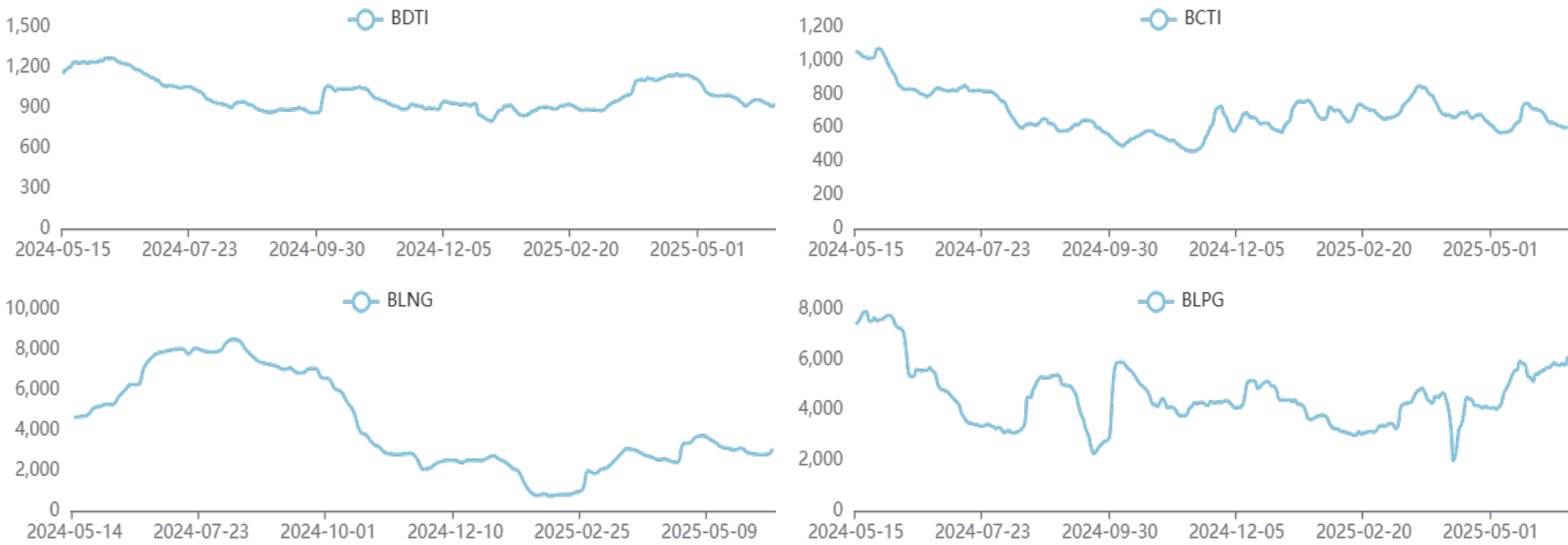
波罗的海干散货指数Baltic Dry Index

Type	PI	WoW	W%	M%	y%
BDI	1968	335.0	20.51	41.79	1.34
BCI	3722	880.0	30.96	84.44	24.69
BPI	1401	155.0	12.44	8.6	-27.03
BSI	936	3.0	0.32	-4.29	-28.71
BHSI	604	4.0	0.67	9.03	-14.69

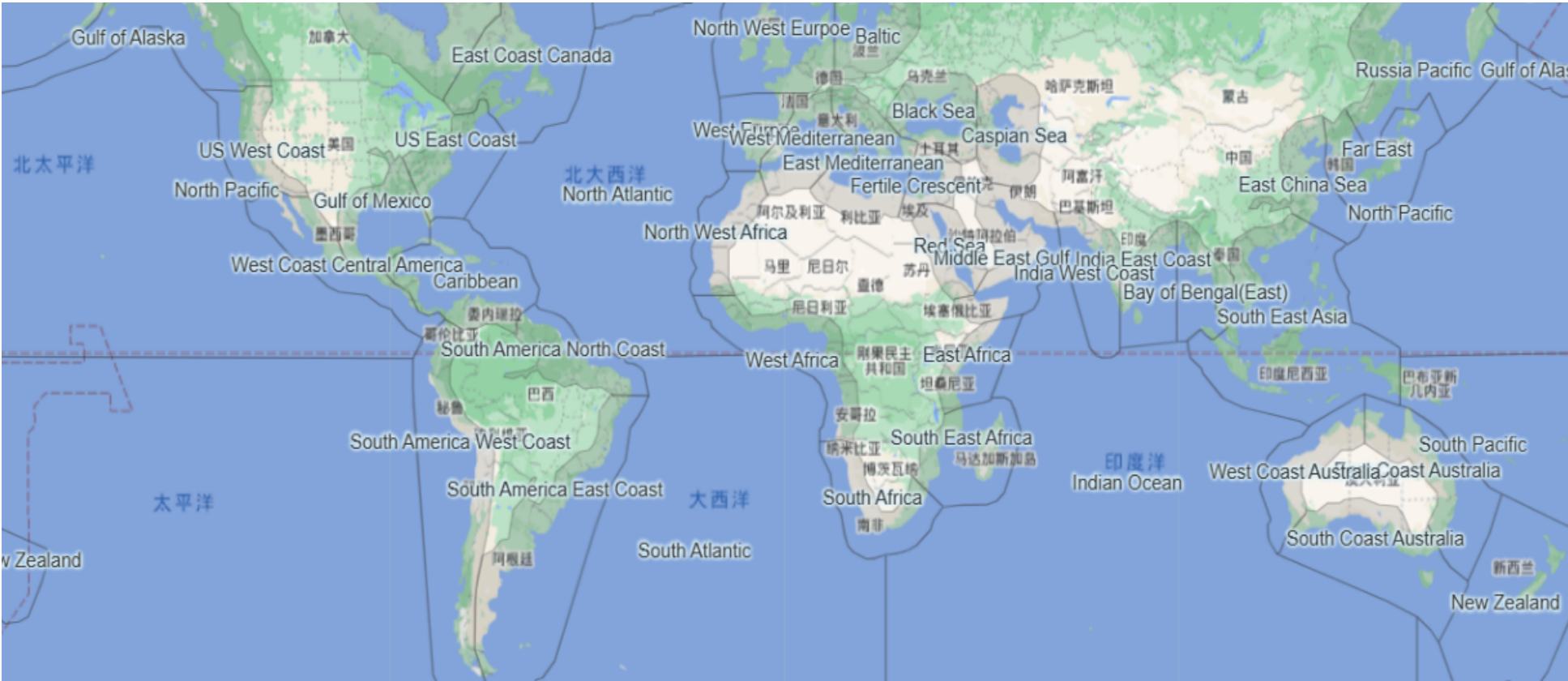


能源运价指数Energy Shipping Index

Type	PI	WoW	W%	M%	y%
BDTI	928	-23.0	-2.42	-6.07	-25.94
BCTI	604	-22.0	-3.51	-3.97	-27.32
BLNG	3057	280.0	10.08	-3.17	-51.14
BLPG	6117	264.0	4.51	9.29	12.47



第四部分 运力分布 SUPPLY DISTRIBUTION

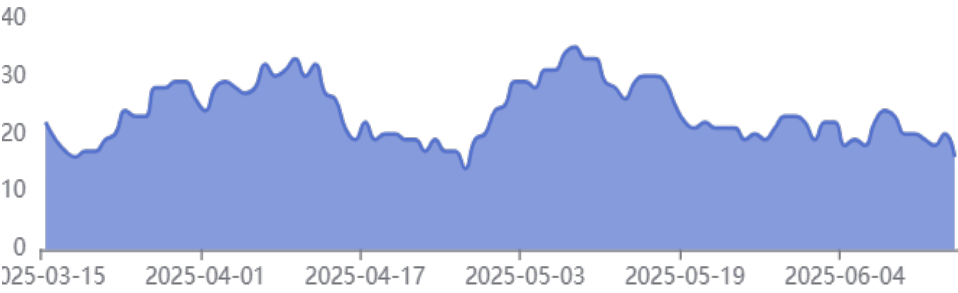


好望角型散货船 Capesize

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	23	20	20	19	18	20	16



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.

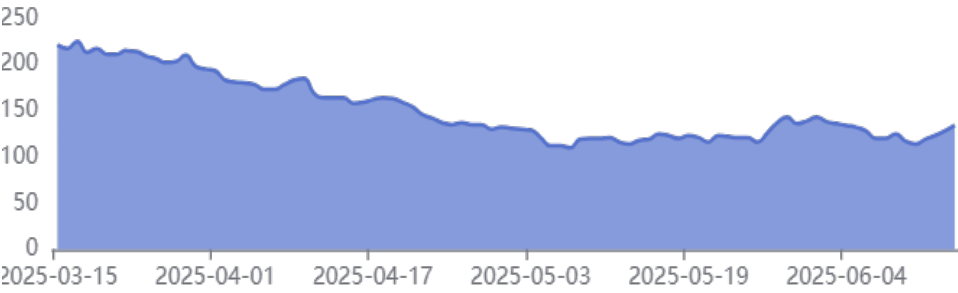
Type	M	T	W	Th	F	Sat	Sun
Cape	24	24	21	19	17	14	21

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.

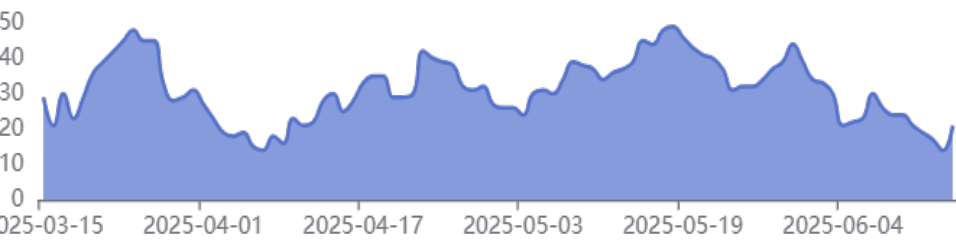
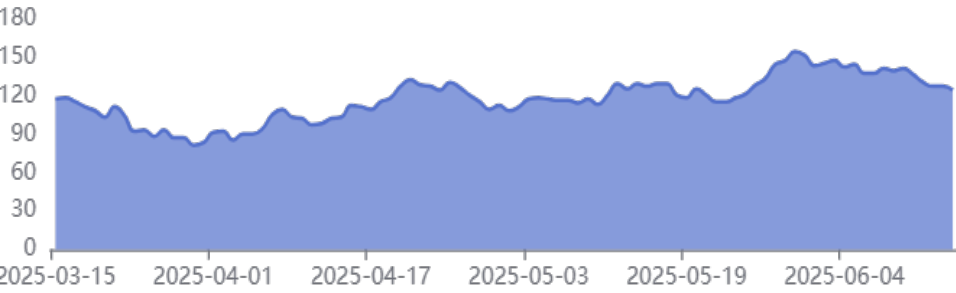
Type	M	T	W	Th	F	Sat	Sun
Pan.	125	117	114	119	123	128	134



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.

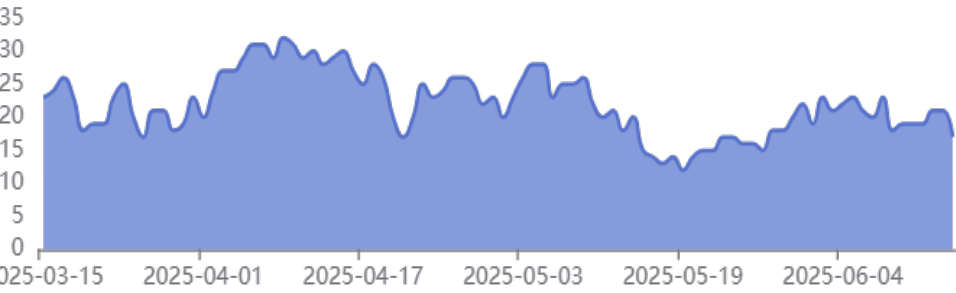
Type	M	T	W	Th	F	Sat	Sun
Cape	139	141	136	130	127	127	124



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.

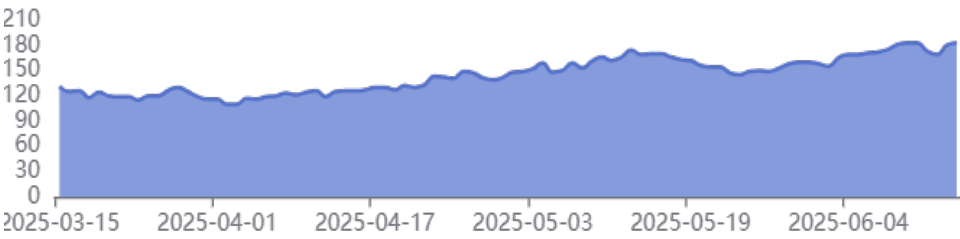
Type	M	T	W	Th	F	Sat	Sun
Pan.	7	7	7	6	7	6	8



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.	181	183	183	173	169	180	183

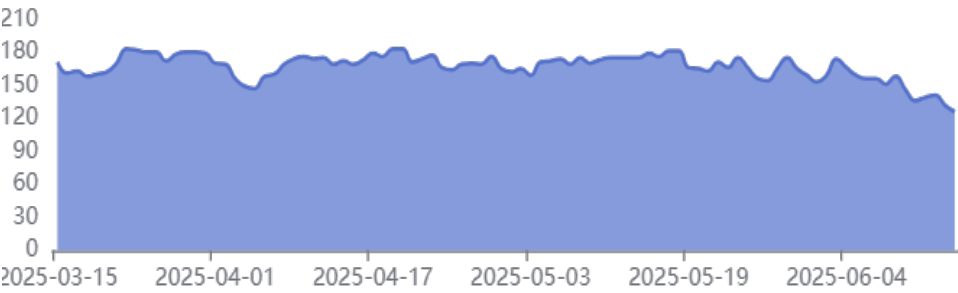


超大灵便型散货 SUPRAMAX

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.

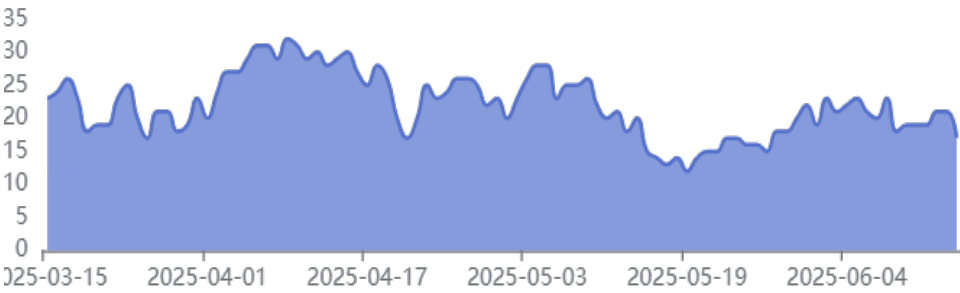
Type	M	T	W	Th	F	Sat	Sun
SMX	158	146	136	139	141	132	126



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.

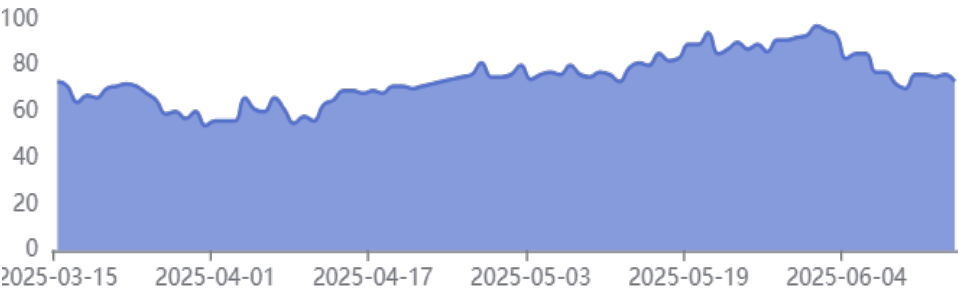
Type	M	T	W	Th	F	Sat	Sun
SMX	18	19	19	19	21	21	17



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.

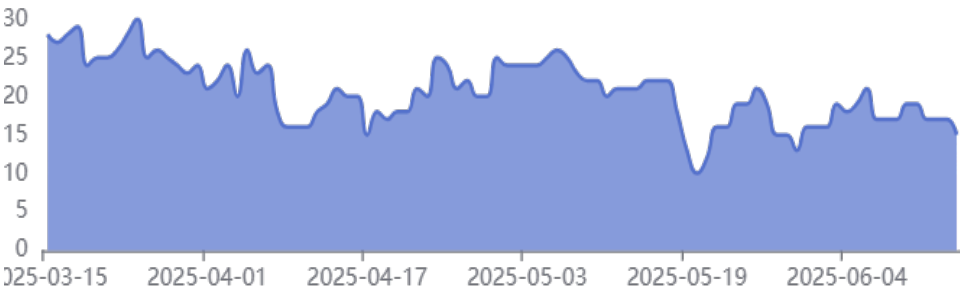
Type	M	T	W	Th	F	Sat	Sun
SMX	17	19	19	17	17	17	15



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.

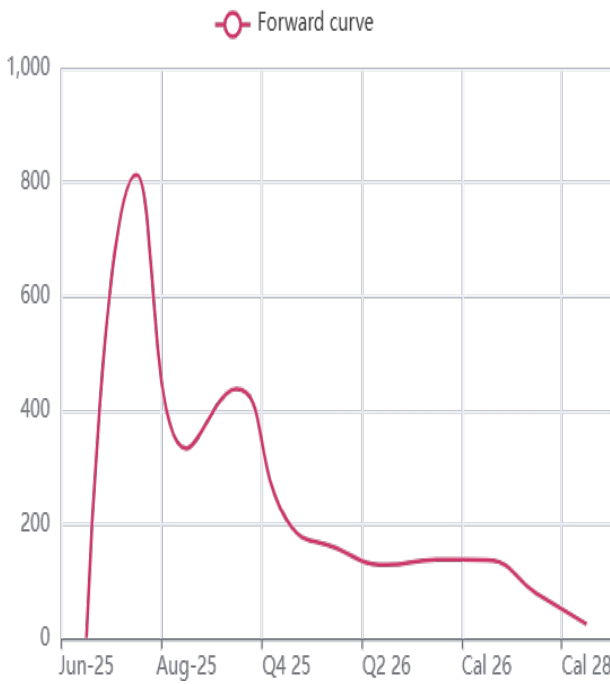
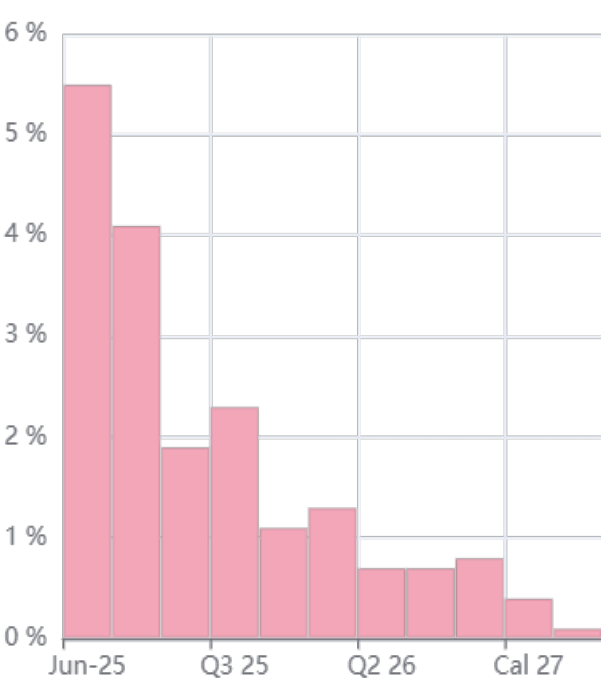
Type	M	T	W	Th	F	Sat	Sun
SMX	72	70	76	76	75	76	73



第五部分 远期运价协议 FFA

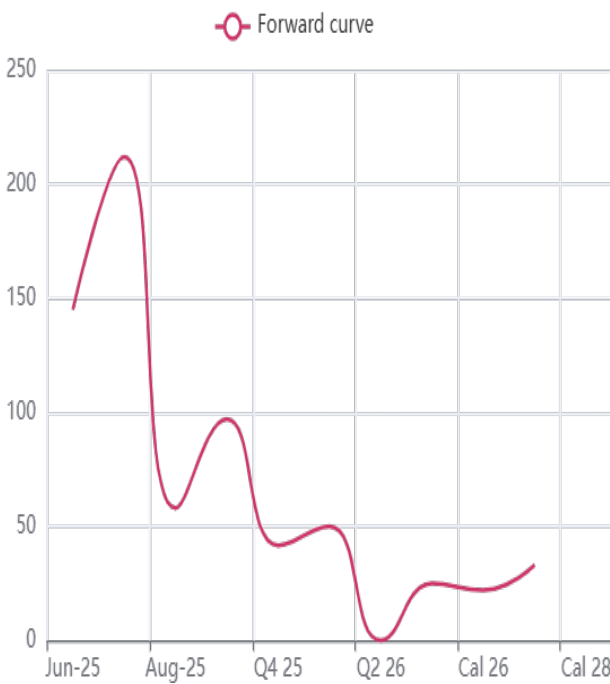
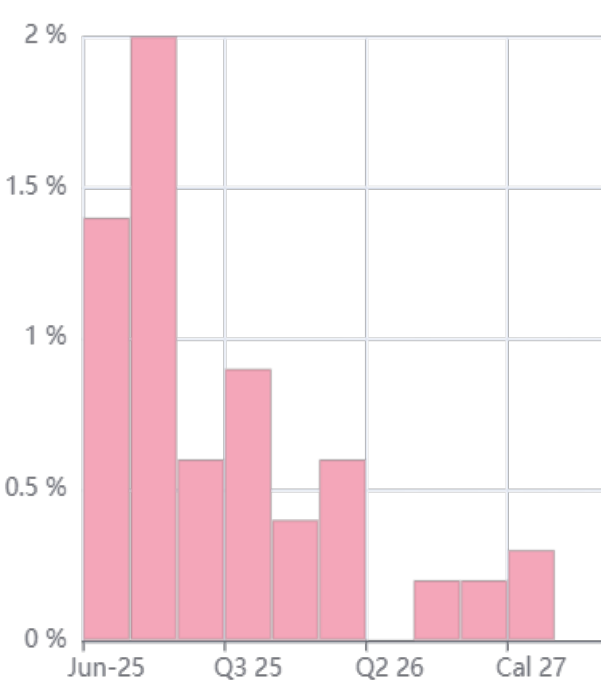
好望角型散货船Capesize

5TC	\$/day	WoW	
Jun-25	25,013.00	1300.0	5.5 %
Jul-25	20,721.00	813.0	4.1 %
Aug-25	17,879.00	333.0	1.9 %
Q3 25	19,354.33	437.67	2.3 %
Q4 25	19,869.33	208.33	1.1 %
Q1 26	12,425.00	158.0	1.3 %
Q2 26	17,408.00	129.0	0.7 %
Q3 26	20,717.00	138.0	0.7 %
Cal 26	17,943.75	137.5	0.8 %
Cal 27	18,817.00	79.0	0.4 %
Cal 28	18,621.00	25.0	0.1 %



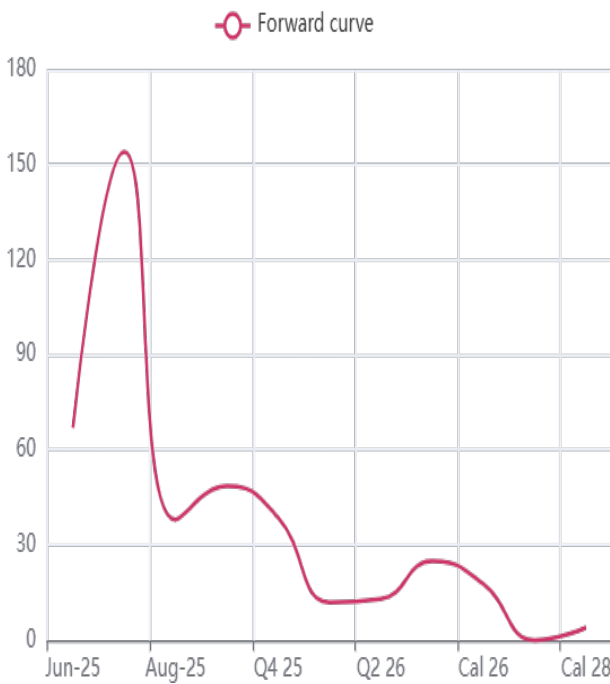
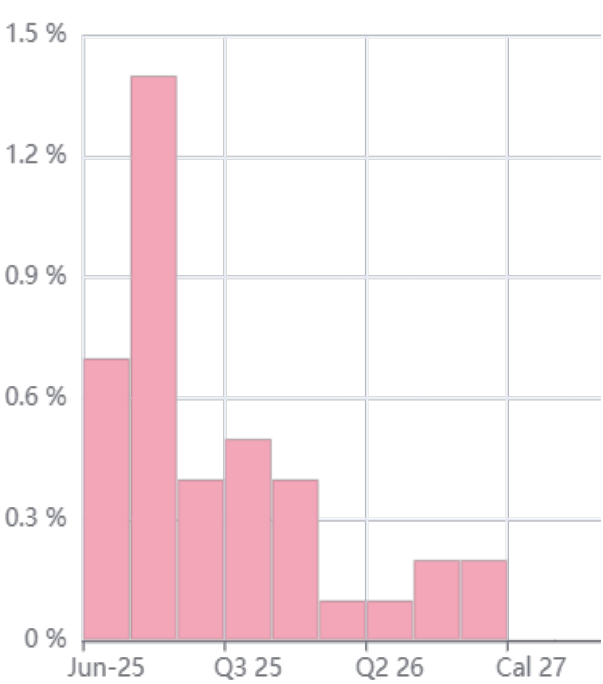
巴拿马型散货船Panamax

4TC	\$/day	WoW	
Jun-25	10,658.00	145.0	1.4 %
Jul-25	10,625.00	212.0	2.0 %
Aug-25	10,250.00	58.0	0.6 %
Q3 25	10,418.00	97.0	0.9 %
Q4 25	10,287.67	41.67	0.4 %
Q1 26	8,500.00	50.0	0.6 %
Q2 26	10,538.00	0.0	0.0 %
Q3 26	10,463.00	25.0	0.2 %
Cal 26	9,916.00	22.0	0.2 %
Cal 27	10,150.00	33.0	0.3 %
Cal 28	-	-	-



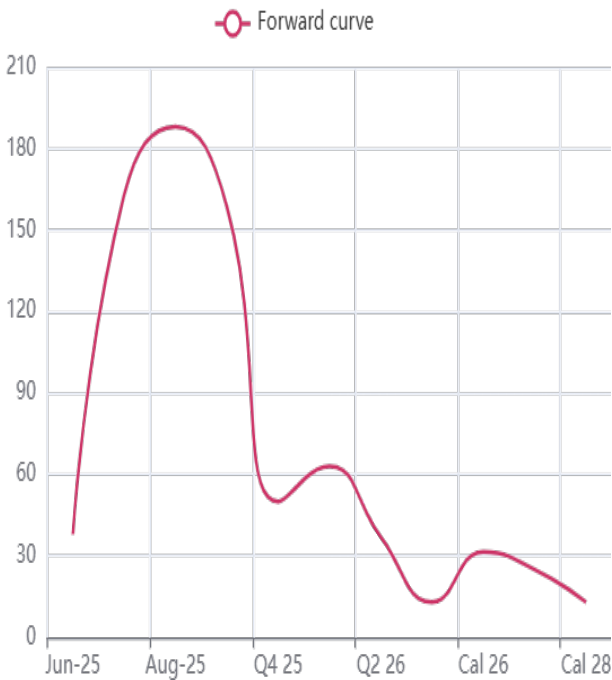
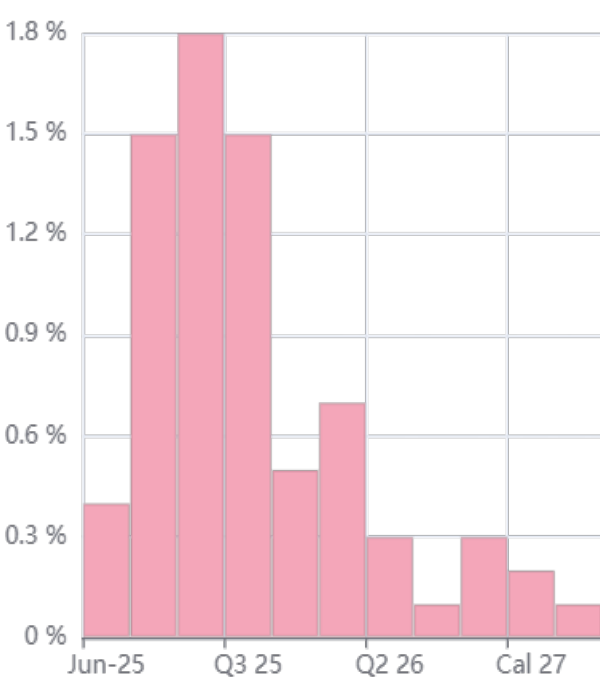
超大灵便型散货船Supramax

10TC	\$/day	WoW	
Jun-25	10,246.00	67.0	0.7 %
Jul-25	10,792.00	154.0	1.4 %
Aug-25	10,696.00	38.0	0.4 %
Q3 25	10,778.00	48.67	0.5 %
Q4 25	10,668.00	38.67	0.4 %
Q1 26	8,979.00	12.0	0.1 %
Q2 26	10,821.00	13.0	0.1 %
Q3 26	10,783.00	25.0	0.2 %
10,288.50	Cal 26	17.75	0.2 %
Cal 27	10,550.00	0.0	0.0 %
Cal 28	10,854.00	4.0	0.0 %



灵便型散货船Handysize

7TC	\$/day	WoW	
Jun-25	10,763.00	38.0	0.4 %
Jul-25	10,938.00	163.0	1.5 %
Aug-25	10,888.00	188.0	1.8 %
Q3 25	10,938.00	158.67	1.5 %
Q4 25	10,725.33	50.0	0.5 %
Q1 26	8,963.00	63.0	0.7 %
Q2 26	10,725.00	37.0	37.0
Q3 26	10,613.00	13.0	0.1 %
Cal 26	10,147.25	31.5	0.3 %
Cal 27	10,313.00	25.0	0.2 %
Cal 28	10,413.00	13.0	0.1 %



第六部分 燃油价格 BUNKER PRICE

MP	LO	HO	MO	SP	WoW	W%	M%
zhoushan	516.5	452.0	633.5	64.5	-3.0	-4.44	22.86
Singapore	512.0	446.5	621.0	65.5	-3.5	-5.07	-18.13
Rotterdam	479.0	430.0	623.5	49.0	0.5	1.03	38.03
Fujairah	480.5	411.0	627.5	69.5	6.0	9.45	5.3
Houston	502.5	421.5	711.5	81.0	-4.5	-5.26	-3.57

(MP-Bunkering Main Ports; LO-Heavy Low Sulphur Fuel Oil; HO-Heavy Hight 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	203.0		1.0	0.5	3.05	-7.73
Maize	220.0		-1.0	-0.45	-2.65	4.76
Soybeans	207.0		4.0	1.97	1.47	-9.61
Rice	173.0		-1.0	-0.57	-1.7	-32.68
Barley	221.0		-1.0	-0.45	-3.07	-2.21
Energy	Index		+/-	Weekly	Monthly	YTD
Crude Oil	USD/Bbl	65.36	2.69	4.29	4.78	-13.38
Brent	USD/Bbl	67.12	2.36	3.64	2.85	-15.7
Natural Gas	USD/MMBtu	3.63	-0.06	-1.63	-2.16	21.81
Gasoline	USD/Gal	2.09	0.03	1.46	-2.34	-12.18
Heating Oil	USD/Gal	2.14	0.09	4.39	0.94	-9.32
Ethanol	USD/Gal	1.66	-0.09	-5.14	-4.05	-8.29
Naphtha	USD/T	542.82	11.69	2.2	-1.63	-13.79
Propane	USD/Gal	0.74	0.0	0.0	-1.33	5.71
Uranium	USD/Lbs	70.5	-1.4	-1.95	-1.05	-19.34
Methanol	CNY/T	2303.0	31.0	1.36	-1.5	-10.0
TTF Gas	EUR/MWh	35.16	-0.28	-0.79	-0.06	7.36
UK Gas	GBp/thm	81.69	-1.08	-1.3	-2.48	5.61
Industrial	Index		+/-	Weekly	Monthly	YTD
Copper	USD/Lbs	4.86	0.14	2.97	5.19	8.24
Coal	USD/T	105.25	-0.1	-0.09	5.51	-20.86
Steel	CNY/T	2953.0	22.0	0.75	-4.4	-14.36
Iron Ore	USD/T	95.62	-0.33	-0.34	-4.14	-11.85
Aluminum	USD/T	2452.05	0.0	0.0	0.48	-4.79
Lithium	CNY/T	60350.0	50.0	0.08	-6.58	-40.54
Metals	Index		+/-	Weekly	Monthly	YTD
Gold	USD/t.oz	3327.8	-33.08	-0.98	2.23	45.04
Silver	USD/t.oz	36.52	2.28	6.66	10.2	22.96
Platium	null	1208.6	157.7	15.01	22.73	N/A
Currencies	Index		+/-	Weekly	Monthly	YTD
EUR/USD	1.14		0.0	0.0	2.7	5.56
USD/CNY	7.19		0.0	0.0	-0.14	-1.1

第八部分 本周话题 WEEKLY TOPIC



万海503轮凶多吉少

2025年6月9日，新加坡籍集装箱船 Wan Hai 503（4,333 TEU，2005年建造）在印度喀拉拉邦阿日卡拉西南约80公里处突发爆炸起火。次日（6月10日），火势未完全控制，船舶出现倾斜并持续爆炸。4名船员失踪，18名船员获救转移。约50个集装箱落海，船体中部至生活区前方集装箱舱损毁严重。印度海岸警卫队两艘船只参与灭火，火势部分受控但形势严峻。

该艘船舶此次火灾据报道可能是集装箱内装载未申报的易燃易爆物（如锂电池、化学品），遇高温或碰撞引发连锁爆炸。锂电池运输中若包装破损、受潮或温度失控，易引发发热失控并蔓延至其他货物。或者危险货物货物积载不当原因，危险品与普通货物混装，或集装箱堆叠压力导致易燃物泄漏。这艘船也属于老旧船，设备可能也老化，船舶建于2005年，船舶消防灭火系统碰到电池引发的火灾估计也难以应对。

夏季高温天气来袭，显著提升了危险品运输的风险。近期，因新能源车、锂电池货物以及二手燃油车引发的火灾事故频繁发生。该火灾事故发生当天，中远海运集运就发布公告，向客户重申正确申报货物信息的重要性。公告着重指出，危险货物托运人的安全责任至关重要。

每一位托运人都必须充分认识到危险货物运输的特殊性，严格依照相关规定，切实履行好安全管理责任。

集装箱货物安全管理建议，强化危险品监管，正确隔离高风险货物，锂电池等第9类危险品需独立积载，远离热源，方便管理和实施灭火；对锂电池集装箱严格做好温度监控等。船员进行专项演练，定期进行危险品火灾模拟训练，掌握典型危险品火灾灭火关键和流程。航运公司联合建立危险品违规托运人数据库，拒绝高风险客户。

On June 9, 2025, the Singapore-registered container ship Wan Hai 503 (4,333 TEU, built in 2005) suddenly exploded and caught fire about 80 kilometers southwest of Ajkala, Kerala, India. The next day (June 10th), the fire was not completely under control, and the ship tilted and continued to explode. Four crew members were missing and 18 were rescued and transferred. About 50 containers fell into the sea, and the container compartments from the middle of the hull to the front of the living area were severely damaged. Two vessels of the Indian Coast Guard were involved in the firefighting efforts. The fire was partially under control but the situation was severe.

It is reported that the fire on this vessel this time might have been caused by the container carrying undeclared flammable and explosive materials (such as lithium batteries and chemicals), which triggered a chain reaction of explosions when exposed to high temperatures or collisions. If the packaging of lithium batteries is damaged, damp or the temperature gets out of control during transportation, it is easy to cause thermal runaway and spread to other goods. Or due to improper stoking of dangerous goods, the mixed loading of dangerous goods and general goods, or the leakage of flammable materials caused by the stacking pressure of containers. This ship is also an old one, and its equipment may be outdated. It was built in 2005. It is estimated that the ship's fire extinguishing system will also be difficult to deal with fires caused by batteries.

The arrival of hot summer weather has significantly increased the risks of transporting dangerous goods. Recently, fire accidents caused by new energy vehicles, lithium battery goods and second-hand fuel vehicles have occurred frequently. On the day of the fire accident, COSCO Shipping Lines issued an announcement, reiterating to customers the importance of accurately declaring cargo information. The announcement emphasizes that the safety responsibility of shippers of dangerous goods is of vital importance. Every shipper must fully recognize the particularity of dangerous goods transportation, strictly abide by relevant regulations, and earnestly fulfill their safety management responsibilities.

Suggestions for the safety management of container cargo: Strengthen the supervision of dangerous goods, properly isolate high-risk goods. Dangerous goods of category 9 such as lithium batteries should be independently stoked, kept away from heat sources, and be convenient for management and fire extinguishing. Strictly monitor the temperature of lithium battery containers, etc. Crew members conduct specialized drills and regularly carry out simulated training on dangerous goods fires to master the key points and procedures for extinguishing typical dangerous goods fires. Shipping companies jointly establish a database of dangerous goods violation shippers and reject high-risk customers.