



2025年 第31周市场周报

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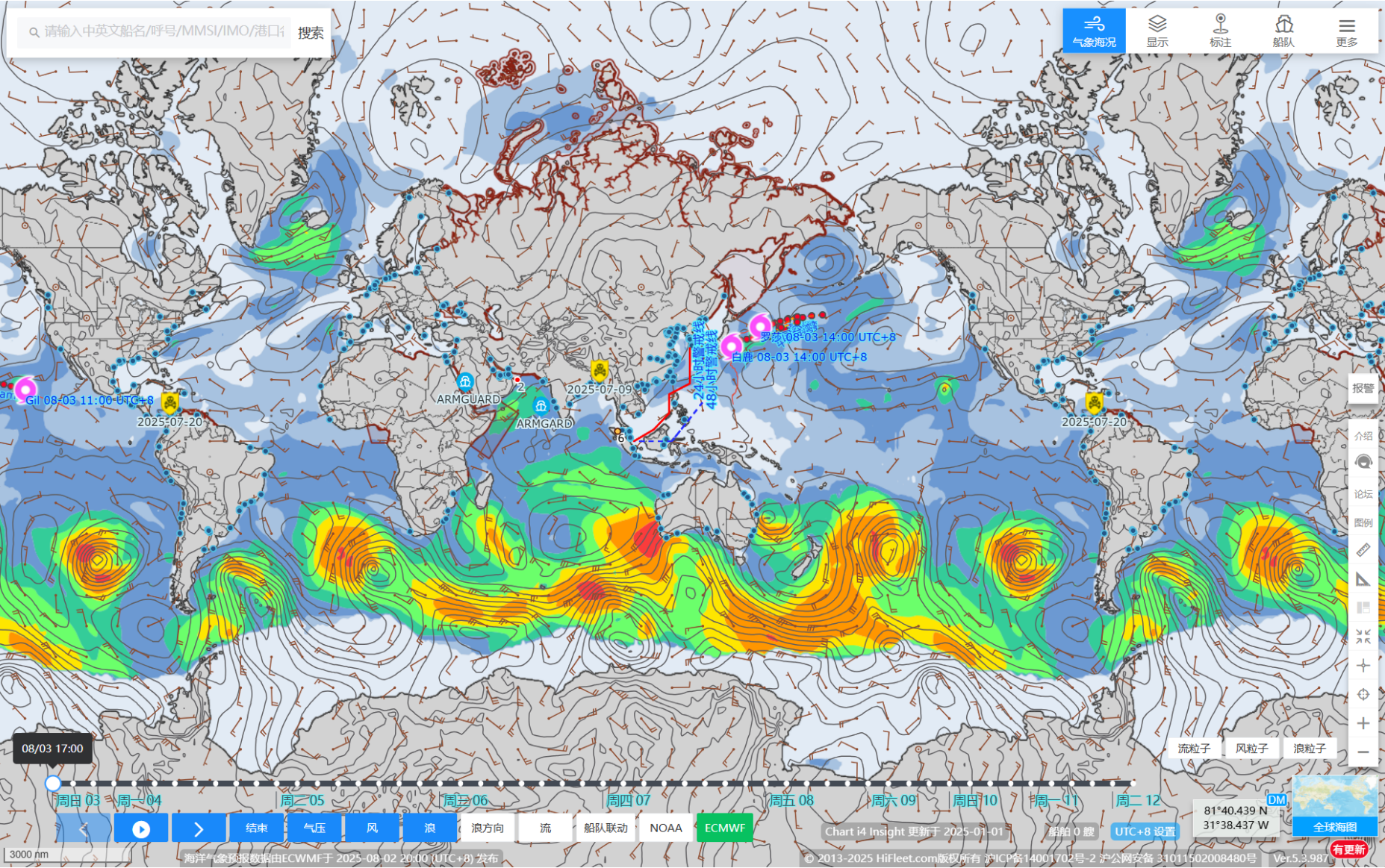
第七部分

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1187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 1187 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3-5级，有中浪；东海风力5-6级，有大浪；台湾海峡5-7级风，前半周有大浪；南海大部海域风力4-6级，前半周有大浪。太平洋北部和北大西洋的气旋开始变得频繁。The coming week the wind in Bohai Sea is moderate with slight sea. Wind in Yellow Sea is moderate with moderate sea occasionally. And China East Sea becomes strong with moderate sea. The wind in the Taiwan Strait becomes easy from strong with rough sea in the beginning of the week. In most of the South China Sea the wind becomes easy with rough sea in the beginning of the week. The cyclone low activities become frequent in North of Pacific and Atlantic.

海盗事件 Piracy

最近一周没有最新海盗报告。There is no piracy report for the latest week.

海上事件 Marine Incidents

8月1日市场报道，亚洲班轮运营商SeaLead在被迫终止一系列新遭美国制裁的集装箱船租约。在上周早些时候美国对伊朗实施的新一轮制裁中，将60多艘船只列入黑名单，其中22艘为集装箱船。On August 1, market reports indicated that Asian liner operator SeaLead was forced to terminate a series of new container ship charters that were sanctioned by the United States. In the latest round of sanctions imposed by the United States on Iran earlier last week, over 60 vessels were blacklisted, including 22 container ships.

其它 Others

没有 Nil

备注 Remark

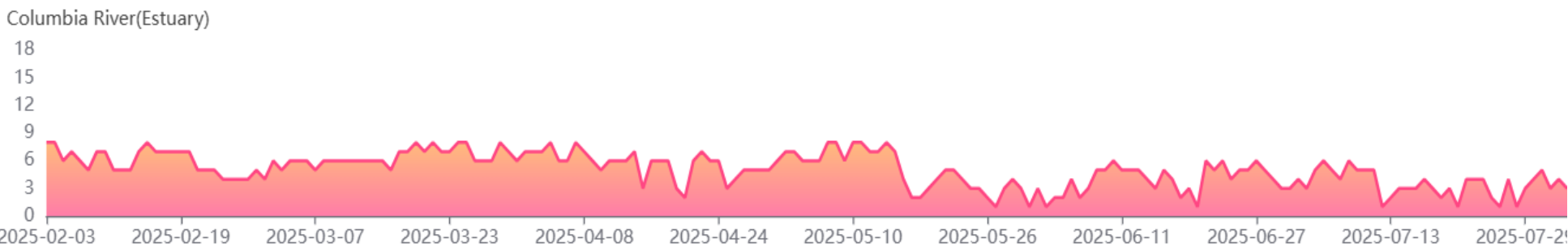
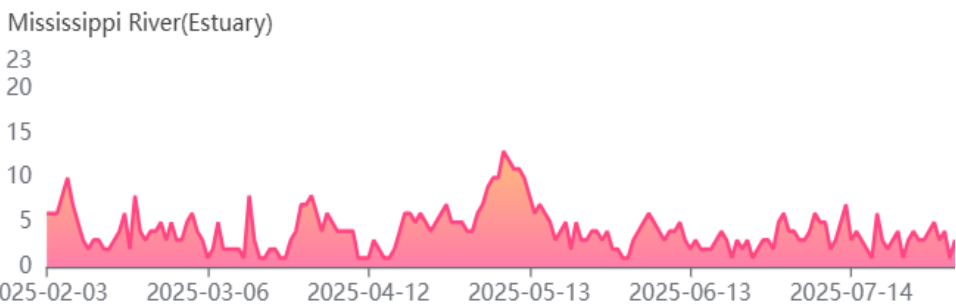
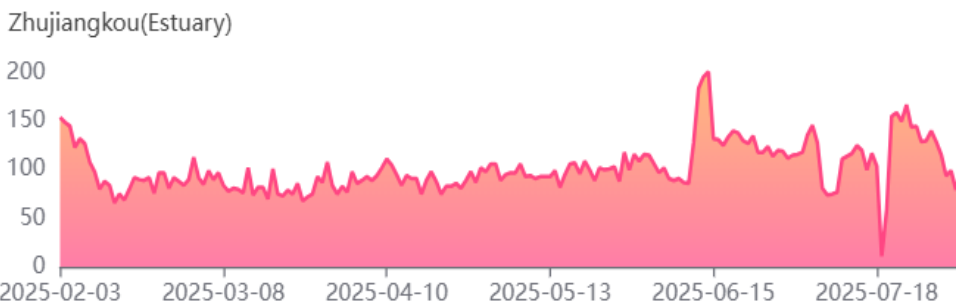
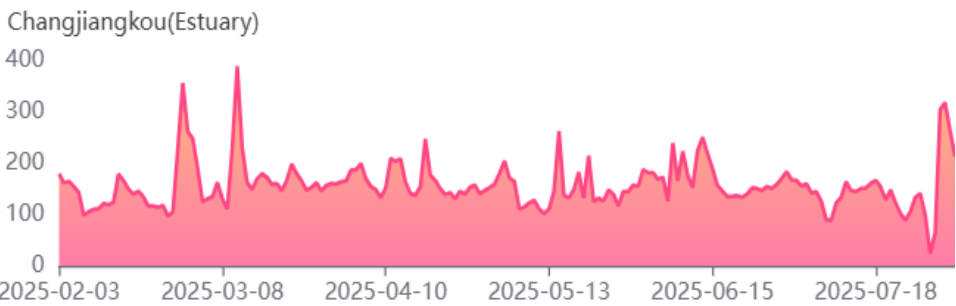
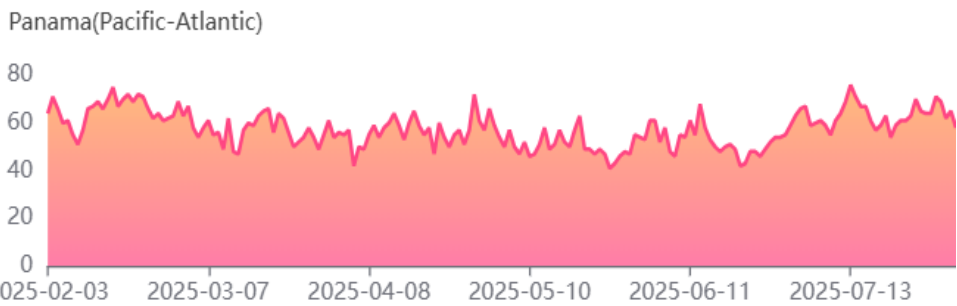
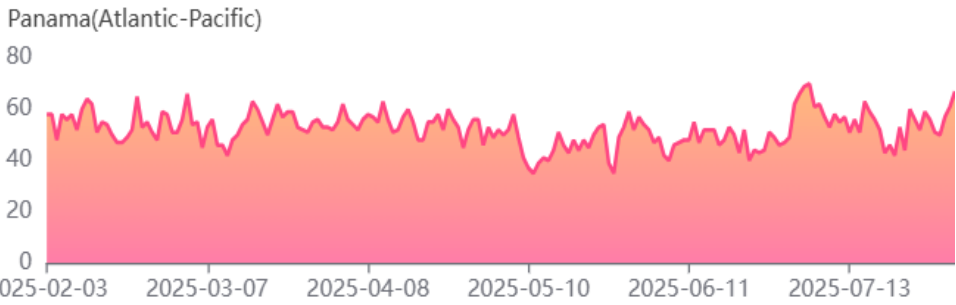
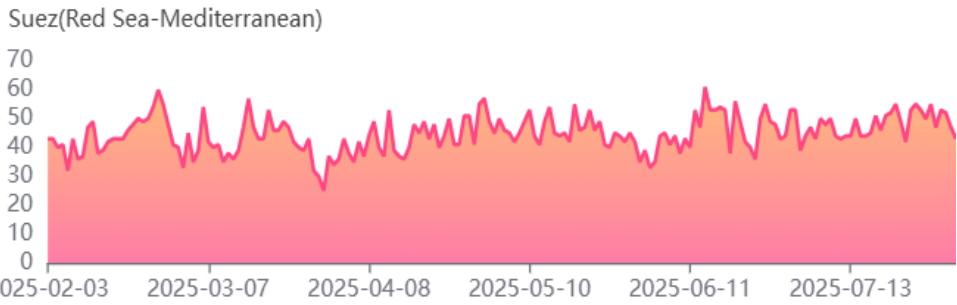
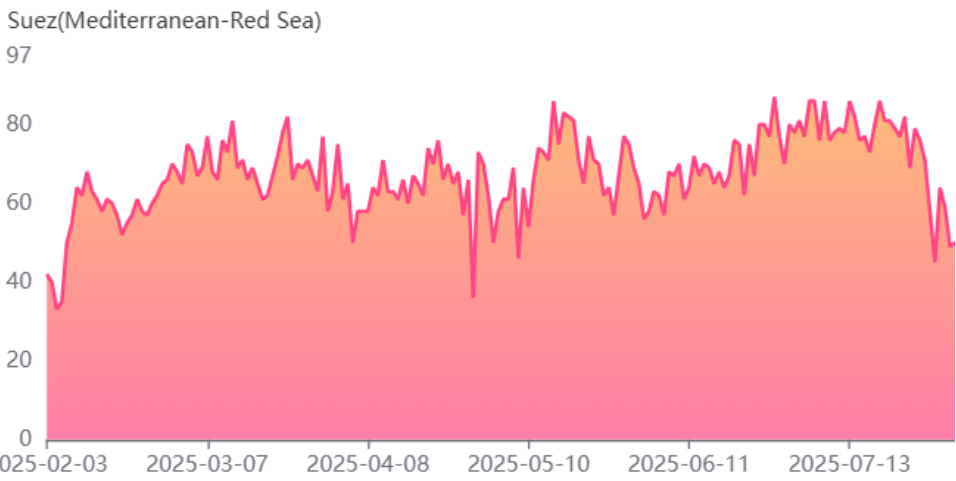
本报告数据截止时间为2025年8月3日北京时间17点；所有数据和或观点仅供参考，在任何情况下本公司及其员工不承担任何风险。The data deadline for this report is Beijing time 17 hours on Aug 03rd of 2025; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

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	43	1403	-10	35
Miss.Riv.	3	102	3	13
CJK	213	4209	458	-591
Pa.Atlan.	67	1588	57	108
Colum.Riv.	3	97	4	-31
Suez.Med.	50	2139	-152	21
Pa.Pac.	58	1836	22	273
ZJK	79	3249	-192	-500

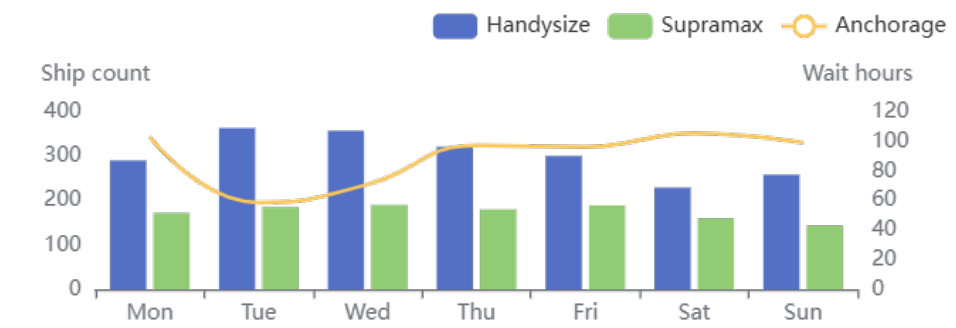


(P.N-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

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

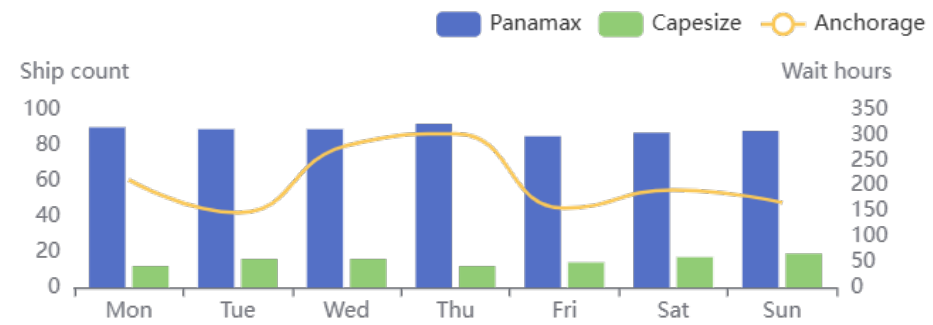
Type	M	T	W	Th	F	Sat	Sun
HDY	290	363	357	321	300	229	258
SMX	172	185	190	180	189	160	144
WT.h.	102.9	58.6	70.9	97.2	96.3	105.3	99



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

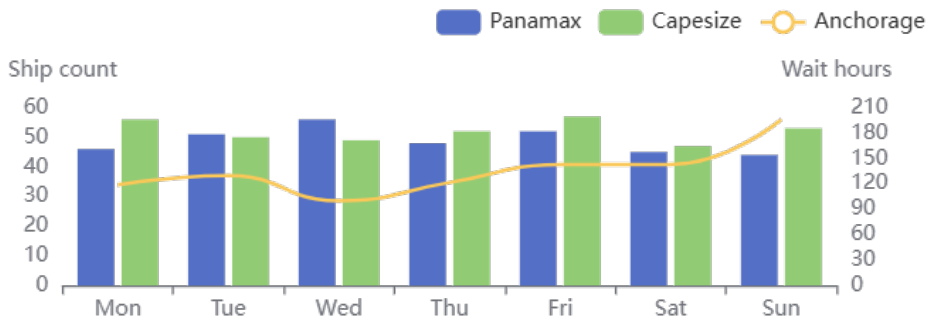
Type	M	T	W	Th	F	Sat	Sun
Pan.	90	89	89	92	85	87	88
Cap	12	16	16	12	14	17	19
WT.h.	211.9	147	279.1	302.7	156	192.1	167



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

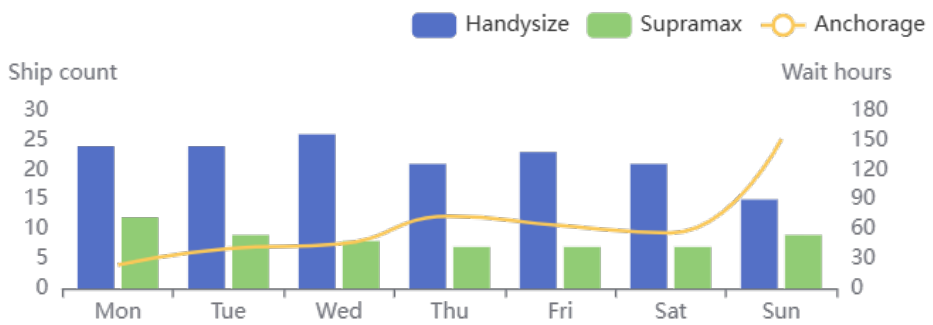
Type	M	T	W	Th	F	Sat	Sun
Pan.	46	51	56	48	52	45	44
Cap	56	50	49	52	57	47	53
WT.h.	118.8	129.8	99.9	121.6	142.6	142.8	196



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

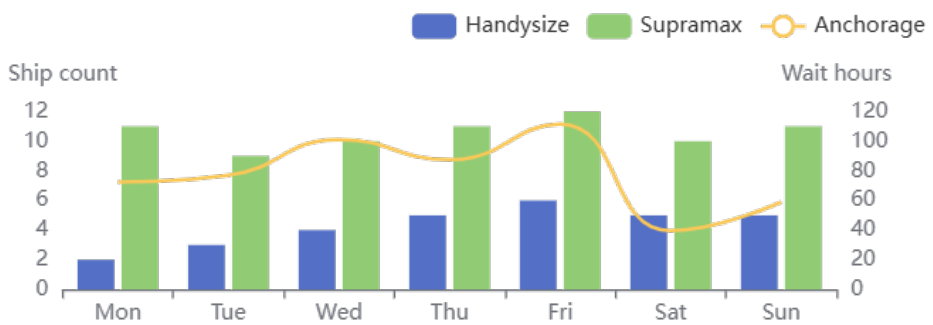
Type	M	T	W	Th	F	Sat	Sun
HDY	24	24	26	21	23	21	15
SMX	12	9	8	7	7	7	9
WT.h.	23.9	40.3	44.95	73	63.55	56.3	151



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

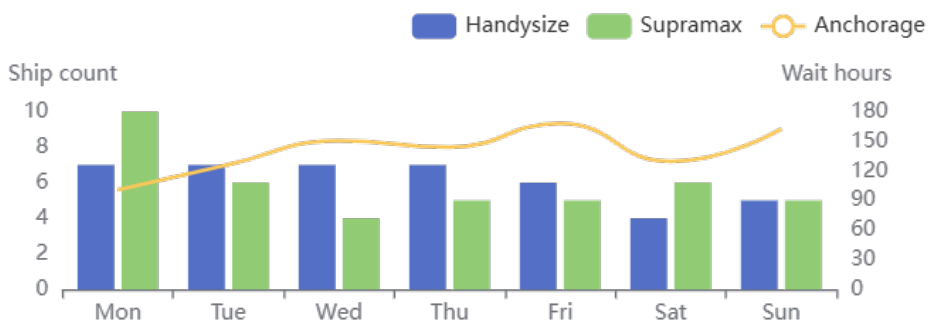
Type	M	T	W	Th	F	Sat	Sun
HDY	2	3	4	5	6	5	5
SMX	11	9	10	11	12	10	11
WT.h.	72.4	77.15	101.15	87.5	111.5	39.6	59



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

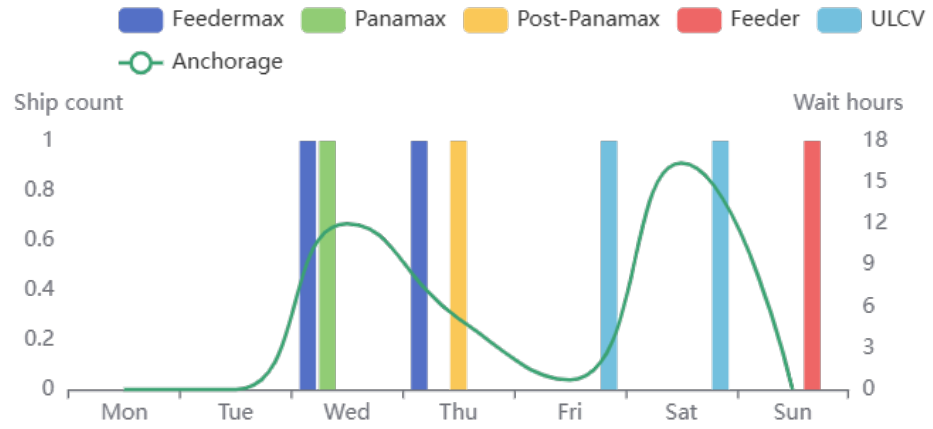
Type	M	T	W	Th	F	Sat	Sun
HDY	7	7	7	7	6	4	5
SMX	10	6	4	5	5	6	5
WT.h.	100.7	126.4	150.4	144.1	168.1	129.5	162.5



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

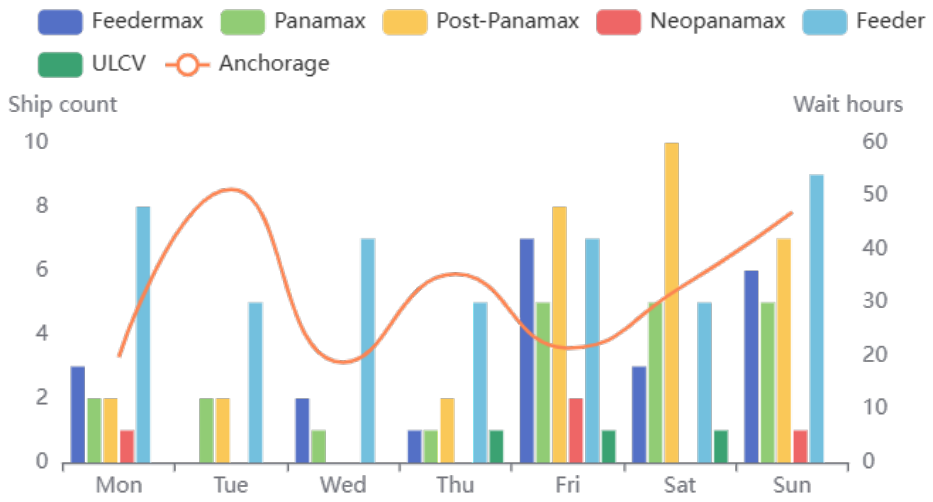
Type	M	T	W	Th	F	Sat	Sun
F.ma.	0	0	1	1	0	0	0
Pan.	0	0	1	0	0	0	0
PPx	0	0	0	1	0	0	0
NPx	0	0	0	0	0	0	0
Fd	0	0	0	0	0	0	1
WT.h.	0.0	0.0	12.0	5.15	0.7	16.4	0
Ulcw	0	0	0	0	1	1	0



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

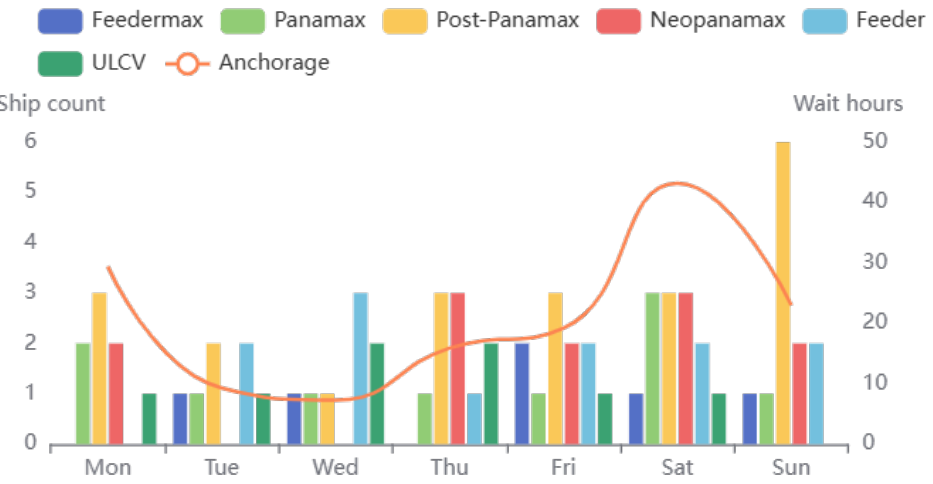
Type	M	T	W	Th	F	Sat	Sun
F.ma.	3	0	2	1	7	3	6
Pan.	2	2	1	1	5	5	5
PPx	2	2	0	2	8	10	7
NPx	1	0	0	0	2	0	1
Fd	8	5	7	5	7	5	9
Ulcw	0	0	0	1	1	1	0
WT.h.	19.8	51.3	18.8	35.4	21.5	32.8	47



最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

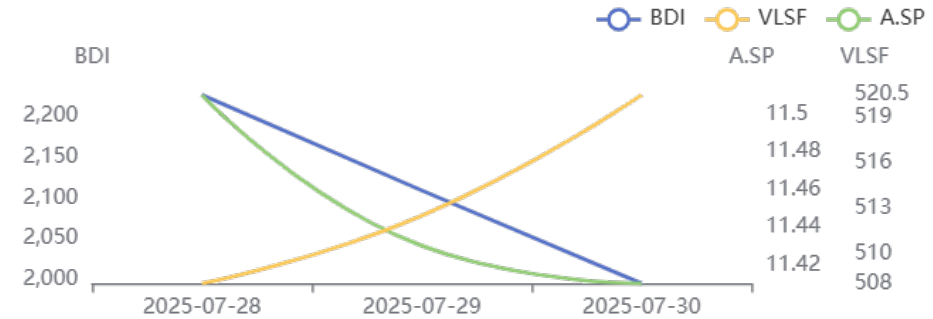
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

Type	M	T	W	Th	F	Sat	Sun
F.ma.	0	1	1	0	2	1	1
Pan.	2	1	1	1	1	3	1
PPx	3	2	1	3	3	3	6
NPx	2	0	0	3	2	3	2
Fd	0	2	3	1	2	2	2
Ulcw	1	1	2	2	1	1	0
WT.h.	29.4	9.3	7.3	15.9	19.2	43.2	23



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

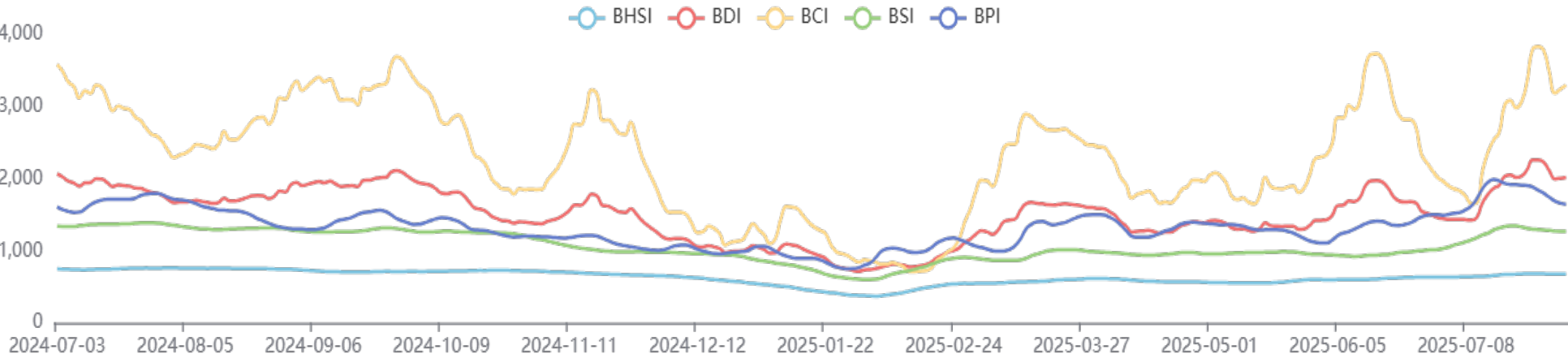
Type	M	T	W	Th	F	Sat	Sun
BDI	1798	1741	1689				
VLSF	508.00	512.50	520.50	520.50			
A.SP	11.51	11.43	11.41	11.54	11.5	11.55	



第三部分 航运市场 SHIPPING MARKET

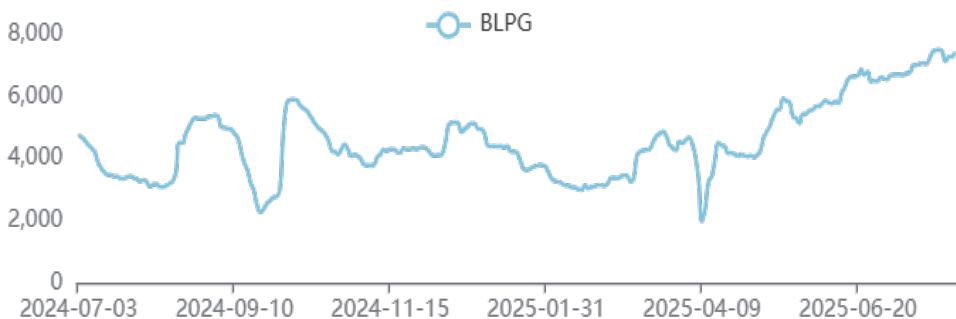
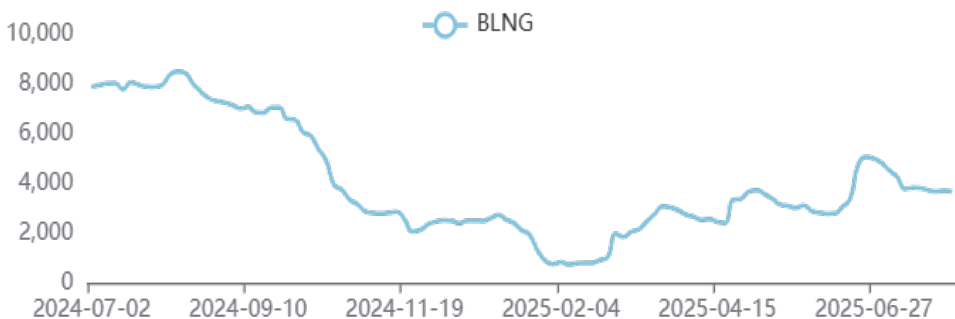
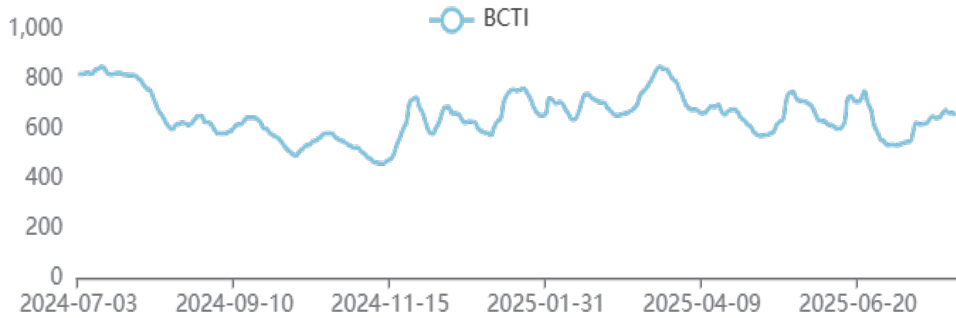
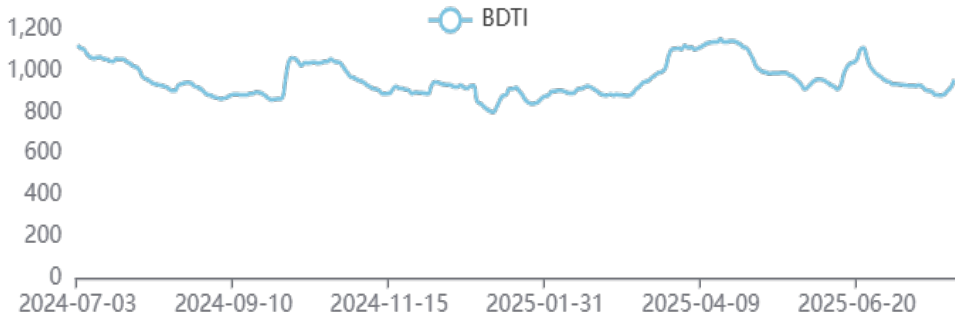
波罗的海干散货指数Baltic Dry Index

Type	PI	WoW	W%	M%	y%
BDI	2018	-239.0	-10.59	40.53	20.98
BCI	3296	-533.0	-13.92	77.68	43.99
BPI	1644	-194.0	-10.55	8.16	-4.03
BSI	1269	-25.0	-1.93	17.39	-6.14
BHSI	678	-4.0	-0.59	7.11	-10.91



能源运价指数Energy Shipping Index

Type	PI	WoW	W%	M%	y%
BDTI	956	74.0	8.39	1.16	-0.42
BCTI	652	8.0	1.24	21.87	-14.21
BLNG	3680	7.0	0.19	-18.4	-53.67
BLPG	7413	-87.0	-1.16	11.07	128.58



第四部分 运力分布 SUPPLY DISTRIBUTION

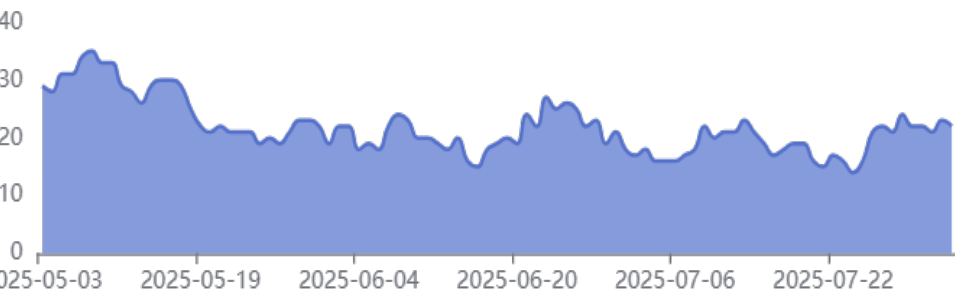


好望角型散货船 Capesize

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	21	24	22	22	21	23	22



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.

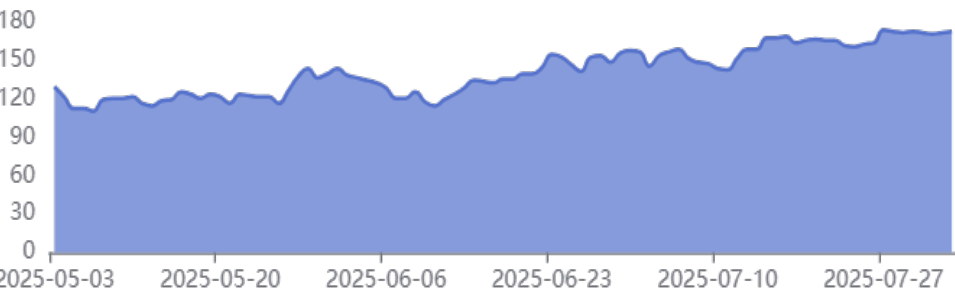
Type	M	T	W	Th	F	Sat	Sun
Cape	33	31	22	31	33	36	32

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.

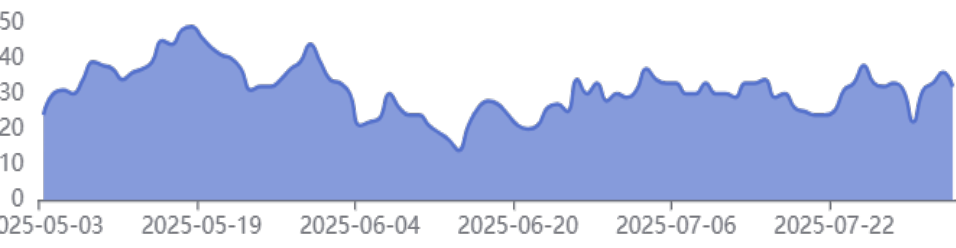
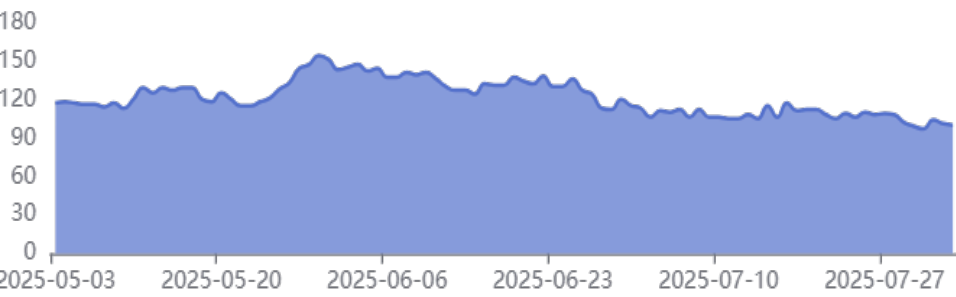
Type	M	T	W	Th	F	Sat	Sun
Pan.	172	171	172	171	170	171	172



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.

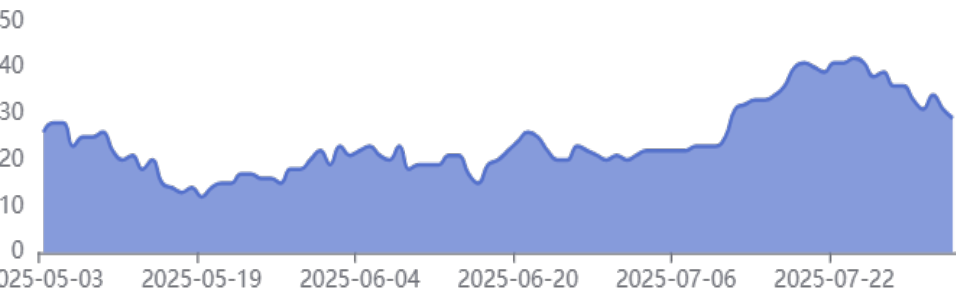
Type	M	T	W	Th	F	Sat	Sun
Cape	108	102	99	97	104	101	100



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.

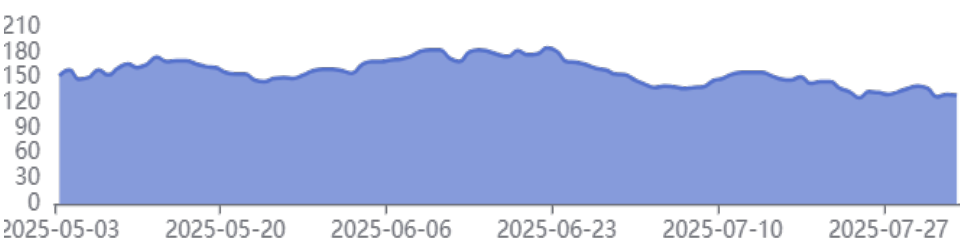
Type	M	T	W	Th	F	Sat	Sun
Pan.	20	20	17	17	18	18	12



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.	133	137	140	137	127	130	129

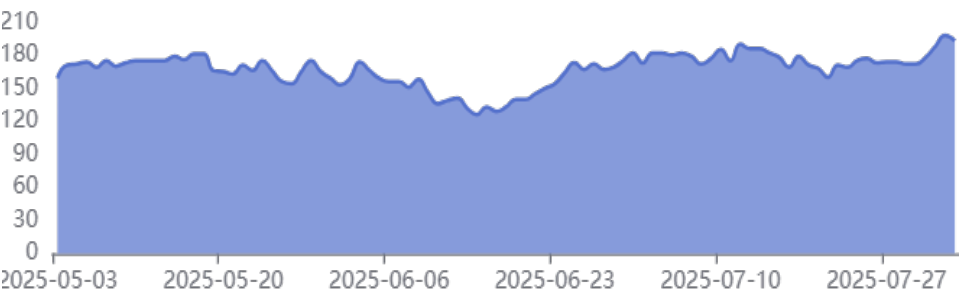


超大灵便型散货 SUPRAMAX

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.

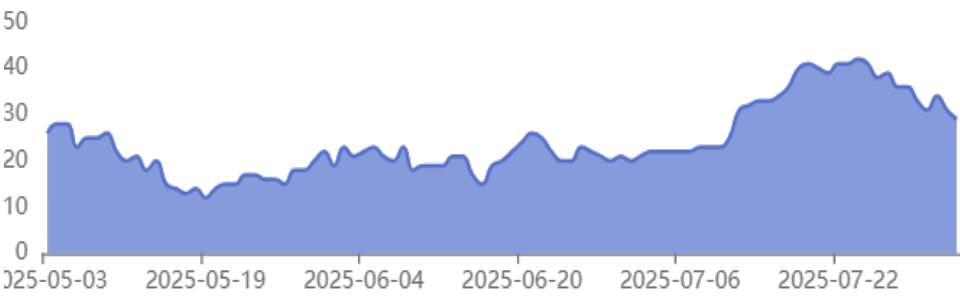
Type	M	T	W	Th	F	Sat	Sun
SMX	174	172	172	178	188	198	193



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.

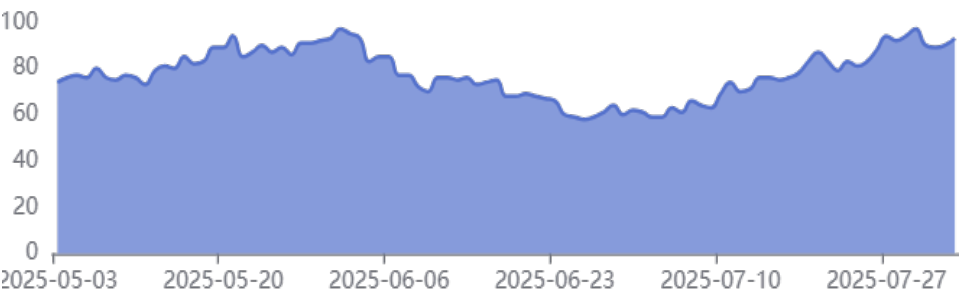
Type	M	T	W	Th	F	Sat	Sun
SMX	36	36	33	31	34	31	29



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.

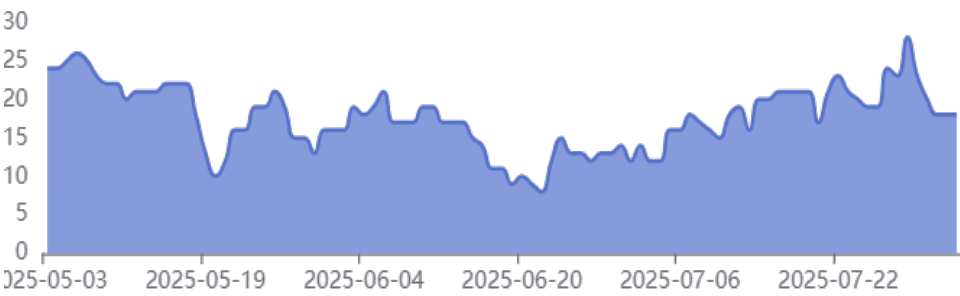
Type	M	T	W	Th	F	Sat	Sun
SMX	23	28	23	20	18	18	18



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.

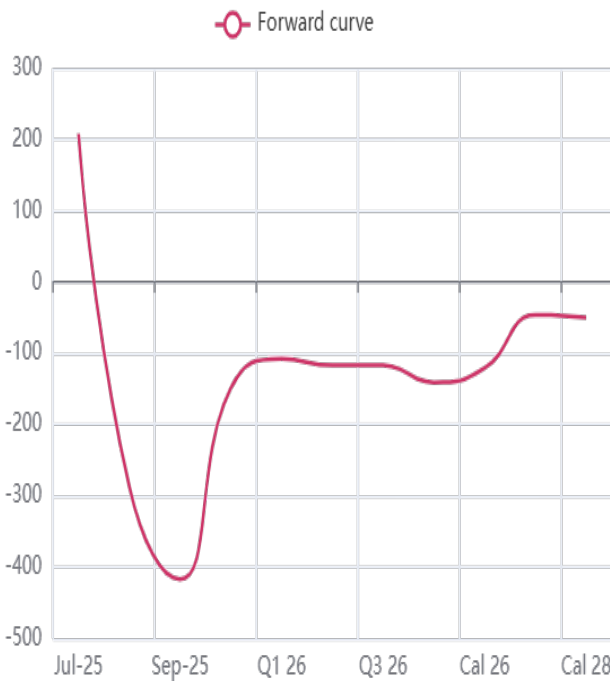
Type	M	T	W	Th	F	Sat	Sun
SMX	92	94	97	90	89	90	93



第五部分 远期运价协议 FFA

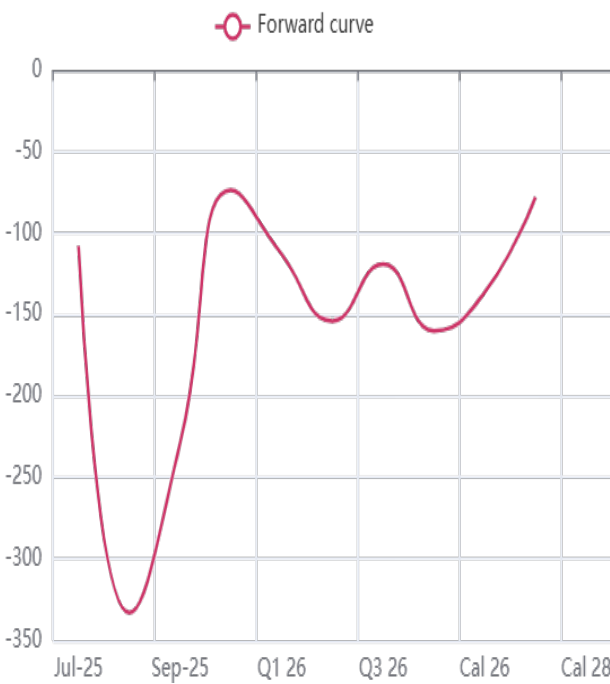
好望角型散货船Capesize

5TC	\$/day	WoW	
Jul-25	21,908.00	208.0	1.0 %
Aug-25	25,171.00	-287.0	-1.1 %
Sep-25	24,571.00	-417.0	-1.7 %
Q4 25	23,493.00	-148.67	-0.6 %
Q1 26	14,725.00	-108.0	-0.7 %
Q2 26	19,371.00	-117.0	-0.6 %
Q3 26	22,429.00	-117.0	-0.5 %
Q4 26	23,017.00	-141.0	-0.6 %
Cal 26	19,885.50	-120.75	-0.6 %
Cal 27	19,667.00	-46.0	-0.2 %
Cal 28	19,038.00	-50.0	-0.3 %



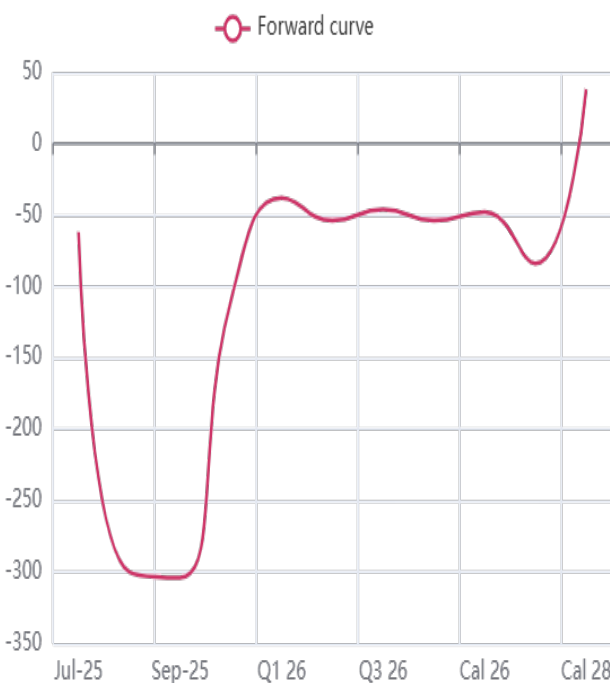
巴拿马型散货船Panamax

4TC	\$/day	WoW	
Jul-25	14,563.00	-108.0	-0.7 %
Aug-25	13,788.00	-333.0	-2.4 %
Sep-25	13,046.00	-229.0	-1.7 %
Q4 25	11,652.33	-73.67	-0.6 %
Q1 26	9,300.00	-113.0	-1.2 %
Q2 26	11,254.00	-154.0	-1.3 %
Q3 26	11,079.00	-119.0	-1.1 %
Q4 26	10,436.00	-160.0	-1.5 %
Cal 26	10,517.25	-136.5	-1.3 %
Cal 27	10,329.00	-78.0	-0.7 %
Cal 28	-	-	-



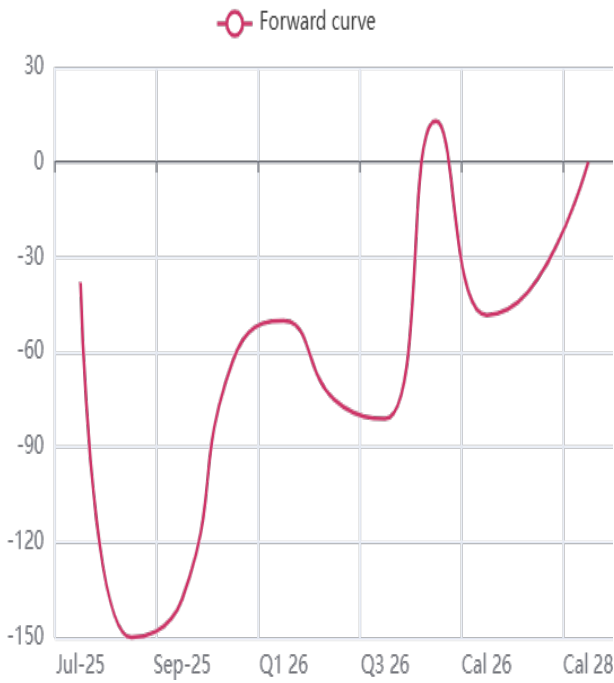
超大灵便型散货船Supramax

10TC	\$/day	WoW	
Jul-25	13,446.00	-62.0	-0.5 %
Aug-25	13,329.00	-300.0	-2.2 %
Sep-25	13,288.00	-304.0	-2.2 %
Q4 25	12,100.00	-110.0	-0.9 %
Q1 26	9,458.00	-38.0	-0.4 %
Q2 26	11,467.00	-54.0	-0.5 %
Q3 26	11,425.00	-46.0	-0.4 %
Q4 26	11,217.00	-54.0	-0.5 %
10,891.75	Cal 26	-48.0	-0.4 %
Cal 27	10,683.00	-84.0	-0.8 %
Cal 28	10,871.00	38.0	0.4 %



灵便型散货船Handysize

7TC	\$/day	WoW	
Jul-25	12,000.00	-38.0	-0.3 %
Aug-25	12,588.00	-150.0	-1.2 %
Sep-25	12,575.00	-138.0	-1.1 %
Q4 25	11,692.00	-62.67	-0.5 %
Q1 26	9,225.00	-50.0	-0.5 %
Q2 26	11,438.00	-75.0	-0.7 %
Q3 26	11,469.00	-81.0	-81.0
Q4 26	11,163.00	13.0	0.1 %
Cal 26	10,823.75	-48.25	-0.4 %
Cal 27	10,713.00	-37.0	-0.3 %
Cal 28	10,725.00	0.0	0.0 %



第六部分 燃油价格 BUNKER PRICE

MP	LO	HO	MO	SP	WoW	W%	M%
zhoushan	520.5	428.0	697.0	92.5	9.5	11.45	18.59
Singapore	515.5	414.0	686.0	101.5	6.0	6.28	8.56
Rotterdam	506.5	439.0	712.5	67.5	0.0	0.0	4.65
Fujairah	501.5	440.5	697.0	61.0	6.5	11.93	18.45
Houston	508.5	400.5	742.5	108.0	1.0	0.93	13.68

(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	195.0		-1.0	-0.51	-1.02	-1.52
Maize	223.0		0.0	0.0	2.76	10.4
Soybeans	209.0		-3.0	-1.42	1.46	-1.88
Rice	168.0		0.0	0.0	-1.18	-31.98
Barley	226.0		2.0	0.89	2.73	6.1
Energy	Index		+/-	Weekly	Monthly	YTD
Crude Oil	USD/Bbl	66.78	1.32	2.02	2.75	-13.65
Brent	USD/Bbl	70.11	1.46	2.13	5.25	-13.75
Natural Gas	USD/MMBtu	3.12	-0.2	-6.02	-8.24	50.72
Gasoline	USD/Gal	2.14	0.03	1.42	3.38	-13.36
Heating Oil	USD/Gal	2.42	-0.06	-2.42	7.08	-0.41
Ethanol	USD/Gal	1.76	-0.02	-1.12	4.76	-0.56
Naphtha	USD/T	552.89	2.79	0.51	-1.17	-19.73
Propane	USD/Gal	0.72	0.01	1.41	-5.26	-8.86
Uranium	USD/Lbs	71.3	0.05	0.07	-9.46	-13.52
Methanol	CNY/T	2355.0	-26.0	-1.09	-2.12	-5.8
TTF Gas	EUR/MWh	33.22	0.06	0.18	-0.63	-0.57
UK Gas	GBp/thm	80.31	-0.01	-0.01	2.12	2.69
Industrial	Index		+/-	Weekly	Monthly	YTD
Copper	USD/Lbs	5.55	0.04	0.73	8.82	36.03
Coal	USD/T	115.5	5.65	5.14	5.1	-17.06
Steel	CNY/T	3283.0	213.0	6.94	10.84	7.46
Iron Ore	USD/T	98.67	1.91	1.97	4.45	-7.66
Aluminum	USD/T	2452.05	0.0	0.0	0.0	8.14
Lithium	CNY/T	73150.0	8250.0	12.71	19.33	-14.44
Metals	Index		+/-	Weekly	Monthly	YTD
Gold	USD/t.oz	3314.33	-46.3	-1.38	-0.93	38.59
Silver	USD/t.oz	37.98	-0.27	-0.71	3.8	35.64
Platium	null	1390.8	-1.1	-0.08	3.08	N/A
Currencies	Index		+/-	Weekly	Monthly	YTD
EUR/USD	1.15		-0.02	-1.71	-2.54	6.48
USD/CNY	7.18		0.01	0.14	0.28	-1.24

第八部分 本周话题 WEEKLY TOPIC



人工智能正在海运中的应用越来越广泛

全球海运集团越来越热衷于人工智能在其日常工作中的应用，通过AI与数字化技术为海运行业提供端到端解决方案，以应对航运业变革、新规及技术挑战。

人工智能的核心技术是运用大数据分析、机器学习、预测技术革新船队管理、应用体验、航程优化及可持续合规与监管。

全球现代化海运企业跟随IMO组织不断严格的绿色要求，专注解决脱碳（如CII、欧盟ETS）的合规需求，提供从数据整合到决策的全流程。

通过AI驱动提升运营效率、安全标准与环境责任，覆盖商业航运、海事管理与全球物流领域。

人工智能在海运的未来应用前景将逐步广泛，涉及船舶减碳的智能管理；涉及航线的安全智能管理；涉及海运经营效益的智能管理；涉及航行安全的智能辅助与升级；等等。

IMO 2050减碳目标及欧盟ETS碳税倒逼行业转型。AI实时监测排放、优化燃料使用、自动生成合规报告，降低违规风险，如CII评级和动态预测管理。

人工智能结合摄像投，AIS时时船舶数据，雷达数据等实现碰撞风险预警与避障；智能航线规划与优化等等。

机器学习分析历史数据，提前预警机械故障或恶劣天气风险。

人工智能结合航运大数据整合港口拥堵、天气、燃料价格数据，动态调整航速与泊位计划，有效提供船舶营运效率。

人工智能和大数据分析邮轮乘客行为偏好，分类定制不同群体的航线和对应餐饮推荐。

人工智能结合大数据模拟船体性能；推进系统损耗优化；不同航线不同船舶船体和动力组合的最佳匹配。

人工智能在船员培训方面也能有所作为，比如VR加AI构建紧急场景模拟器，提升船员应急处置能力。

全球约90%贸易依赖海运，人工智能降本增效需求广泛存在；航运绿色脱碳法规催生技术红利。未来人工智能将深度重构海运行业的运营逻辑，从被动合规转向主动优化，核心价值在于降本、减碳、提效。

Global shipping groups are increasingly enthusiastic about the application of artificial intelligence in their daily operations, providing end-to-end solutions for the shipping industry through AI and digital technologies to address the changes, new regulations and technological challenges in the shipping sector.

The core technologies of artificial intelligence are to apply big data analysis, machine learning, and predictive technologies to revolutionize fleet management, application experience, voyage optimization, and sustainable compliance and regulation.

Global modern shipping enterprises follow the increasingly strict green requirements of the IMO organization, focusing on addressing compliance needs for decarbonization (such as CII and the EU ETS), and provide a full process from data integration to decision-making.

Enhance operational efficiency, safety standards and environmental responsibility through AI-driven solutions, covering commercial shipping, maritime management and global logistics.

The future application prospects of artificial intelligence in maritime transportation will gradually expand, covering intelligent management for carbon reduction of ships; intelligent management for the safety of shipping routes; intelligent management for the operational efficiency of maritime transportation; intelligent assistance and upgrading for navigation safety; and so on.

The IMO 2050 carbon reduction target and the EU ETS carbon tax are driving the industry's transformation. AI real-time monitoring of emissions, optimizing fuel usage, and automatically generating compliance reports can reduce the risk of non-compliance, such as CII ratings and dynamic predictive management.

Artificial intelligence, in combination with camera feeds, AIS real-time vessel data, radar data, etc., enables collision risk warnings and obstacle avoidance; intelligent route planning and optimization, etc. Machine learning analyzes historical data to predict mechanical failures or adverse weather risks in advance.

By integrating shipping big data, artificial intelligence combines data on port congestion, weather, and fuel prices to dynamically adjust ship speeds and berth plans, effectively enhancing the operational efficiency of vessels.

Artificial intelligence and big data analysis are used to identify the behavioral preferences of cruise passengers, categorize different groups, and customize routes and corresponding dining recommendations accordingly.

Artificial intelligence combined with big data simulates the performance of ship hulls; optimizes the loss of propulsion systems; and finds the best match of ship hulls and power combinations for different routes and different ships.

Artificial intelligence can also play a role in crew training, for instance, by using VR combined with AI to build emergency scenario simulators and enhance crew members' emergency response capabilities.

Approximately 90% of global trade relies on maritime transportation, and there is a widespread demand for artificial intelligence to reduce costs and increase efficiency. Regulations for green and decarbonized shipping have given rise to technological dividends. In the future, artificial intelligence will deeply restructure the operational logic of the maritime industry, shifting from passive compliance to active optimization. The core value lies in cost reduction, carbon emission reduction, and efficiency improvement.