



2024年 第31周市场周报

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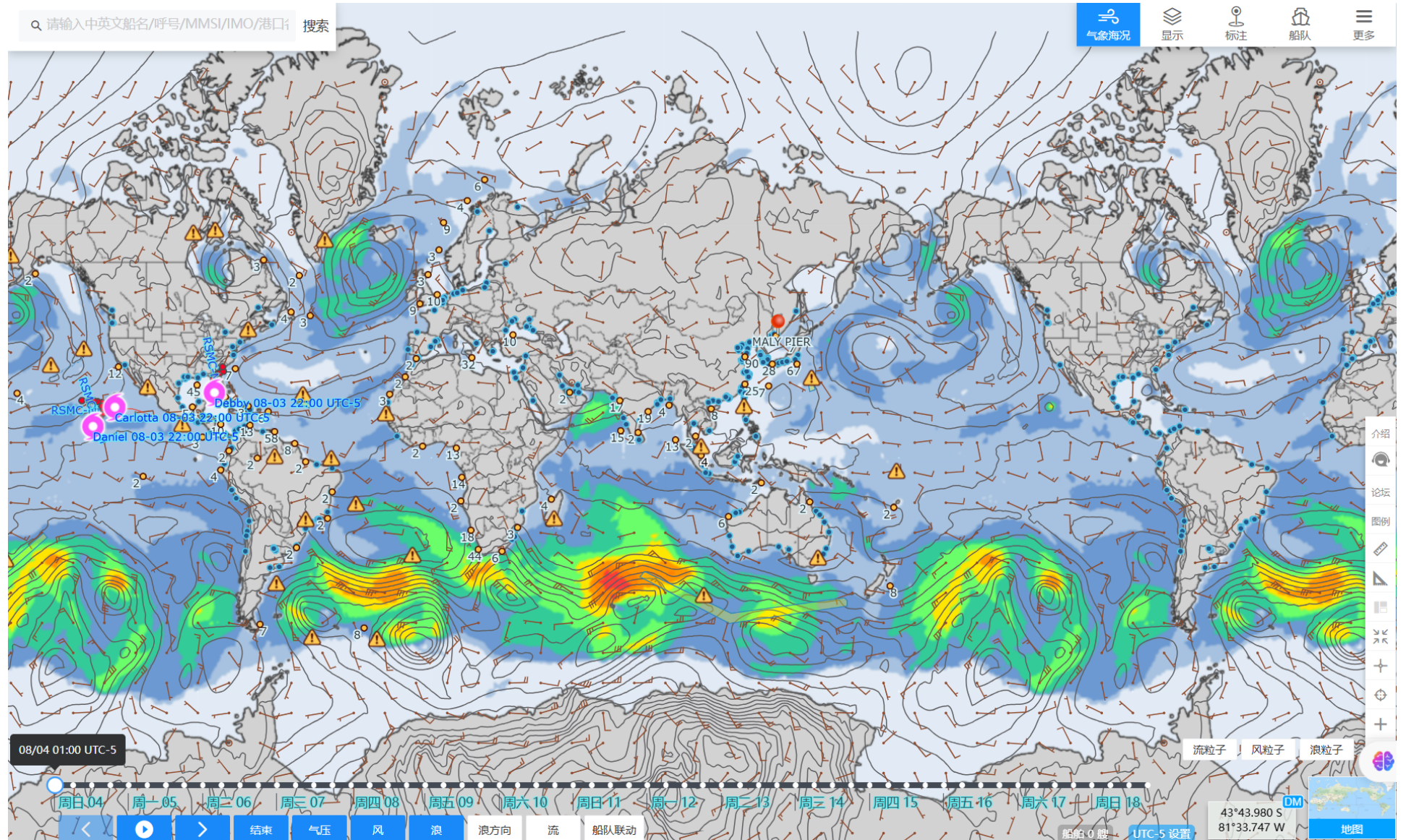
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本周话题 WEEKLY TOPIC

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837个，东南亚和环加勒比海居多，请相关水域船舶注意航行警告内容。There are currently 837 navigational warnings in effect around the ocean on hiFleet with the South 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

未来一周中国渤海海域风力维持3-4级，相关海域1米轻浪；黄海风力维持4-5级，相关海域中浪；东海风力未来将经历5-6级，相关海域中浪；台湾海峡风力将经历4-5级，台湾海峡中浪；南海大部海域风力4-5级，中浪。西北太平洋的热带风暴和台风开始频繁发生。The coming week the wind in Bohai Sea stays gentle breeze with slight seas. Yellow Sea stays moderate with moderate wave. And China East Sea shall experience strong breeze with moderate wave. The wind in the Taiwan Strait will experience moderate and the sea there experience moderate. In most of the South China Sea the wind is moderate with moderate sea. There are low-pressures developing frequently in the North of the Pacific Ocean.

海盗事件 Piracy

2024年7月28日，新加坡海峡，一艘正在航行的散货船上的警觉船员发现三名未经授权人员登船。警报响起，船员集合并通知了船舶交通服务中心（VTS），这些人员随后逃跑。船只在指定锚地停靠后，海岸警卫队对船只进行了检查。28.07.2024: 1830 UTC: Posn: 01:04.63N - 103:41.75E, Singapore Straits. Alert crew onboard a bulk carrier underway noticed three unauthorized persons on board. Alarm raised, crew mustered and VTS notified, resulting in the persons escaping. The coast guard inspected the ship upon anchoring at the designated anchorage area.

海上事件 Marine Incidents

7月29日，一艘在南非海岸遇险并被遗弃的13,800载重吨的“Ultra Galaxy”（建于2008年）散货船在遭遇恶劣天气后断成四部分。南非海事安全局表示，该船遭遇每15秒出现一次的八米高的大浪，导致住宿舱首先脱落，随后船体出现进一步裂缝。On 29 July, a 13,800-DWT "Ultra Galaxy" bulk carrier (built in 2008) that was in distress and abandoned off the coast of South Africa broke into four parts after encountering bad weather. The South African Maritime Safety Authority said the ship encountered waves of eight metres high, which occur every 15 seconds, causing the accommodation cabin to fall off first, followed by further cracks in the hull.

其它 Others

没有 Nil

备注 Remark

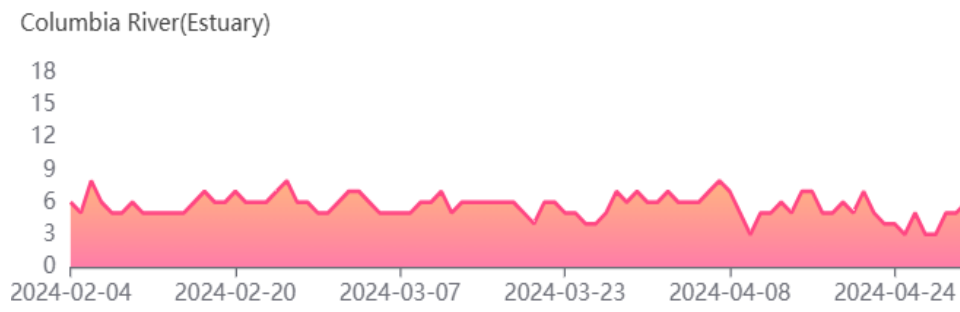
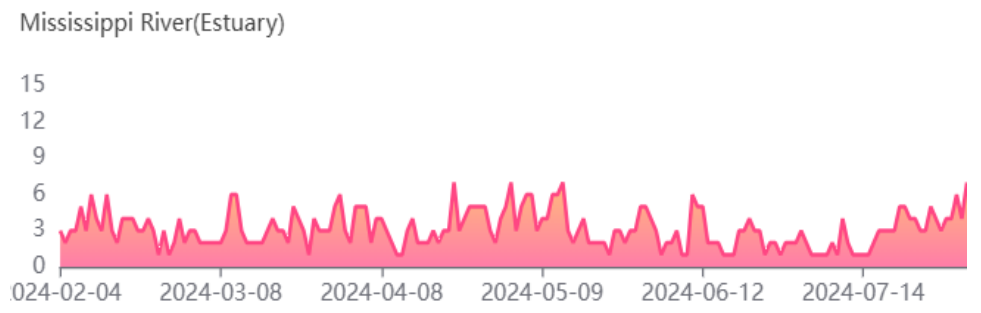
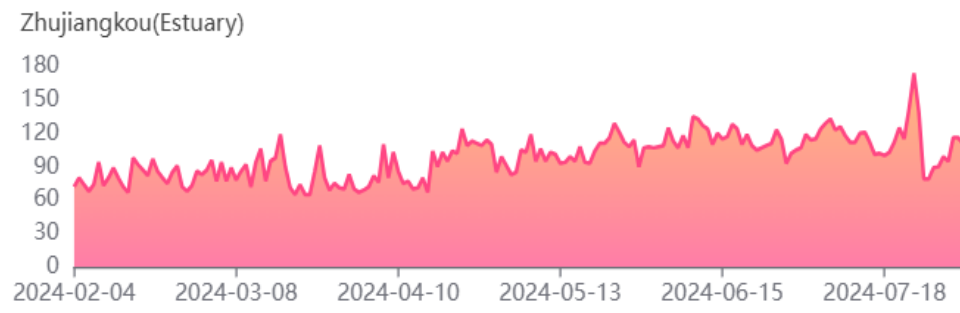
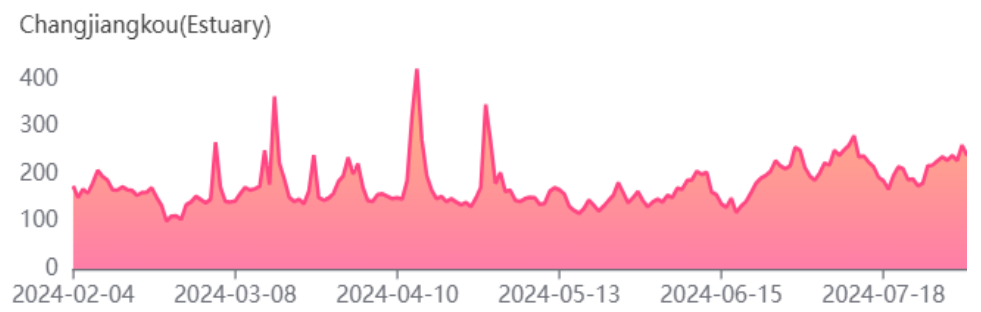
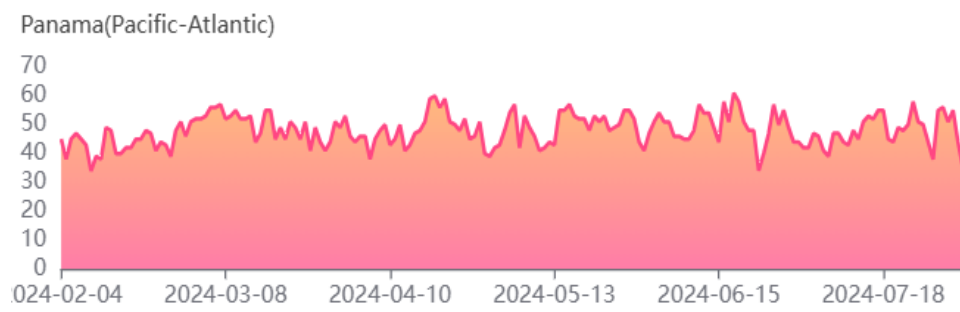
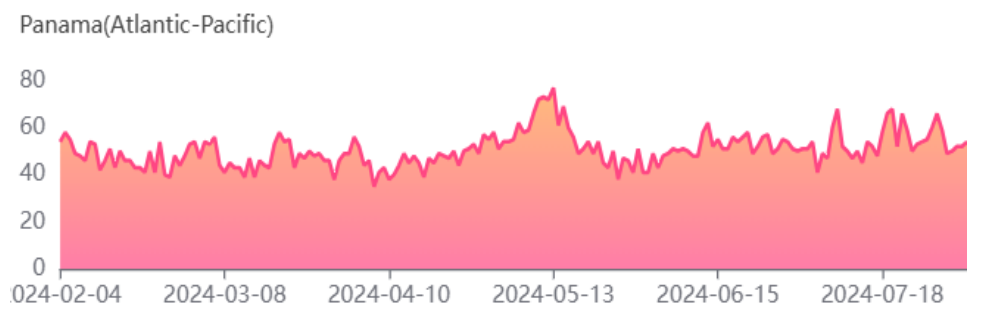
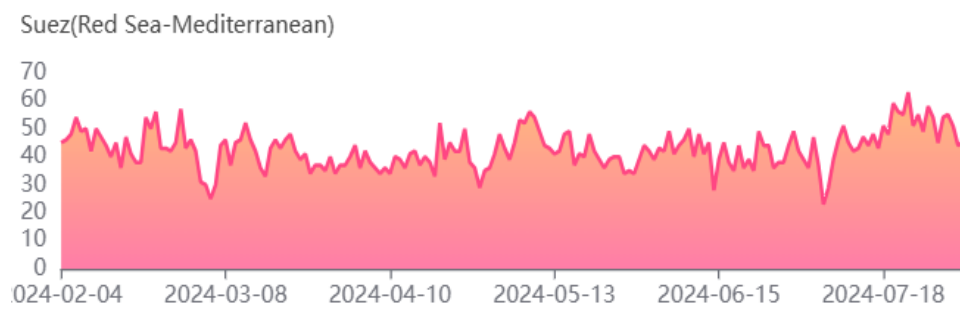
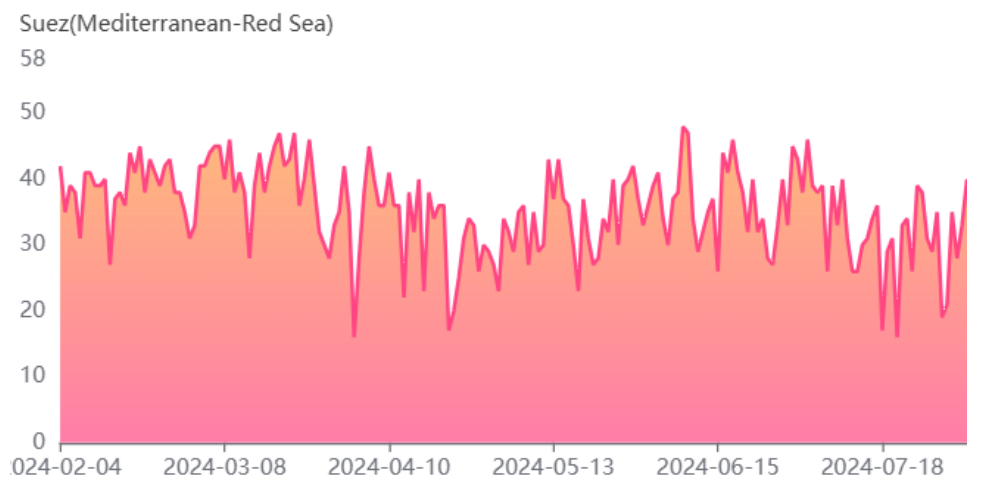
本报告数据截止时间为2024年8月4日北京时间17点；所有数据和或观点仅供参考，在任何情况下本公司及其员工不承担任何风险。The data deadline for this report is Beijing time 17 hours on Aug 4th of 2024; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

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	36	1406	-57	248
Miss.Riv.	7	89	5	26
CJK	239	6414	283	936
Pa.Atlan.	54	1596	-7	80
Colum.Riv.	2	172	-18	56
Suez.Med.	40	886	-6	-177
Pa.Pac.	32	1384	-22	-19
ZJK	77	3241	-149	-141

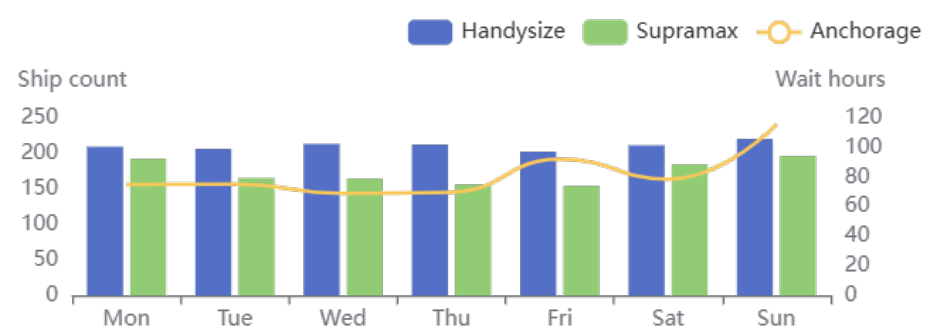


(P.N.-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

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

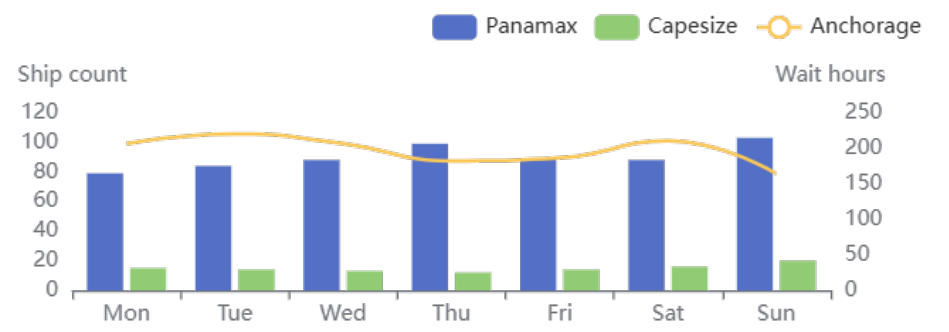
Type	M	T	W	Th	F	Sat	Sun
HDY	209	206	213	212	202	211	220
SMX	192	165	164	156	154	184	196
WT.h.	75	75.2	68.9	69.7	92	78.5	115.5



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

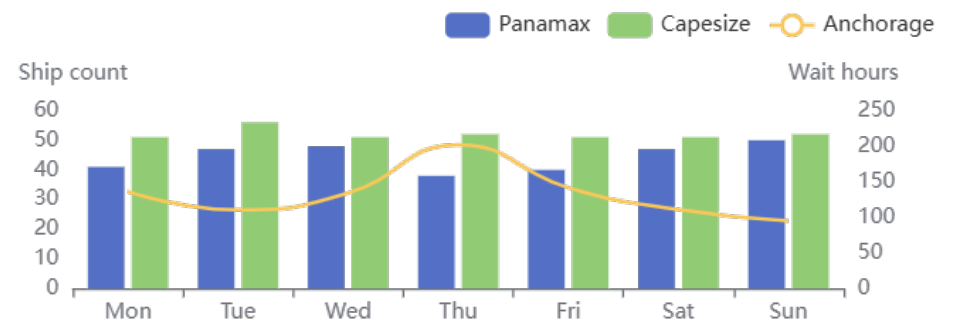
Type	M	T	W	Th	F	Sat	Sun
Pan.	79	84	88	99	89	88	103
Cap	15	14	13	12	14	16	20
WT.h.	206.4	220.2	206.3	182.2	186.3	210.3	164



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

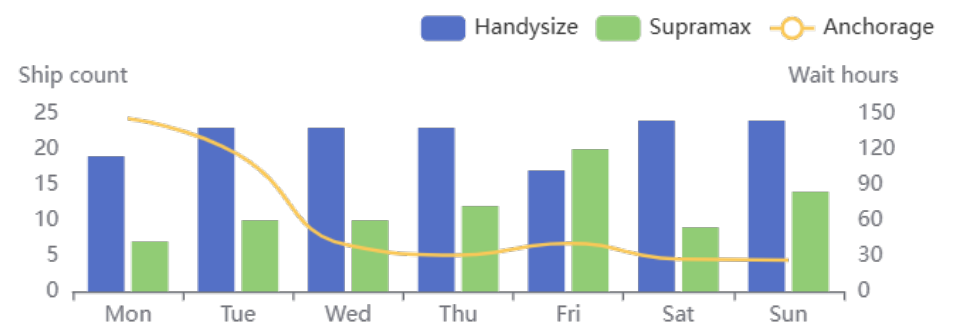
Type	M	T	W	Th	F	Sat	Sun
Pan.	41	47	48	38	40	47	50
Cap	51	56	51	52	51	51	52
WT.h.	136.0	110.3	134.3	202.0	141.7	110.8	95



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

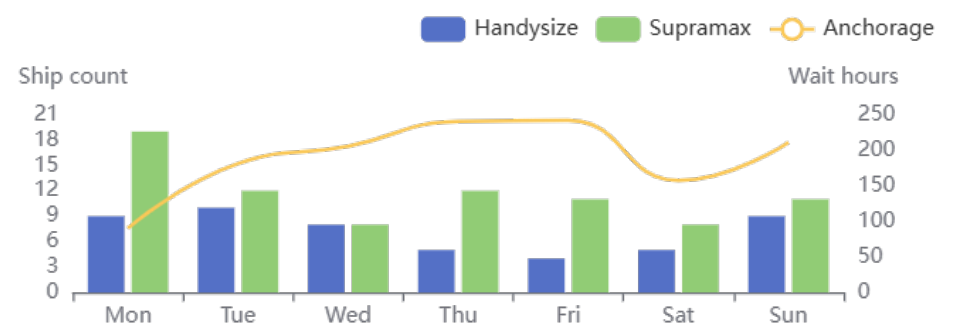
Type	M	T	W	Th	F	Sat	Sun
HDY	19	23	23	23	17	24	24
SMX	7	10	10	12	20	9	14
WT.h.	145.85	115.5	38.9	30.7	40.6	27.3	26.5



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

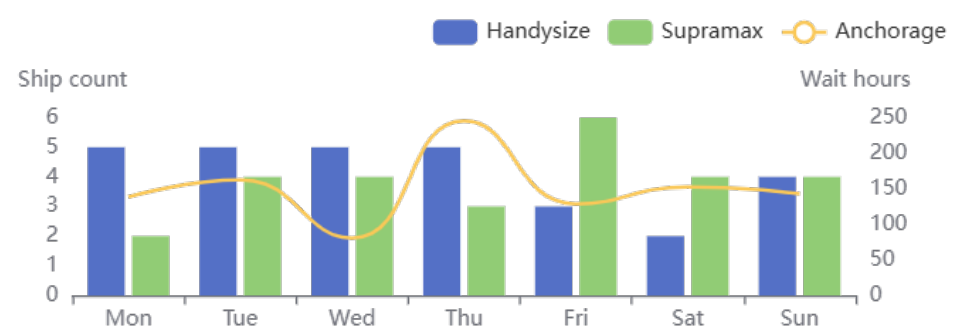
Type	M	T	W	Th	F	Sat	Sun
HDY	9	10	8	5	4	5	9
SMX	19	12	8	12	11	8	11
WT.h.	90.2	181.15	205.6	240.4	241.9	157.3	211



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

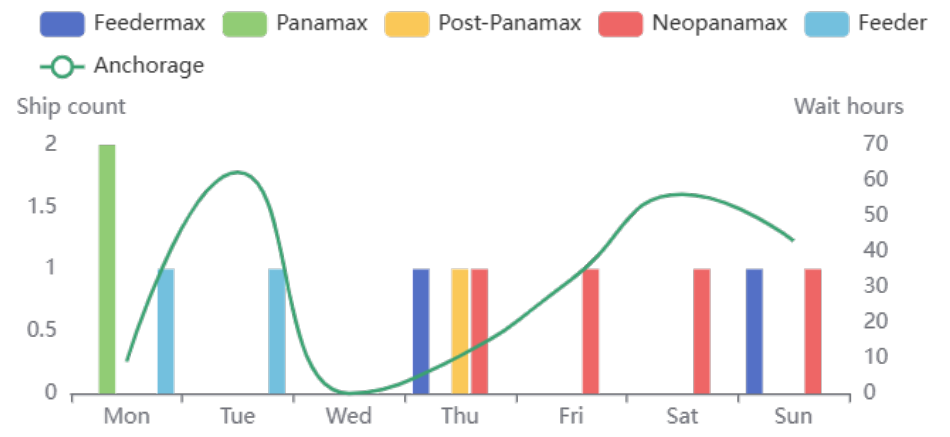
Type	M	T	W	Th	F	Sat	Sun
HDY	5	5	5	5	3	2	4
SMX	2	4	4	3	6	4	4
WT.h.	138.6	162.6	80.7	245.75	128.7	152.7	143



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

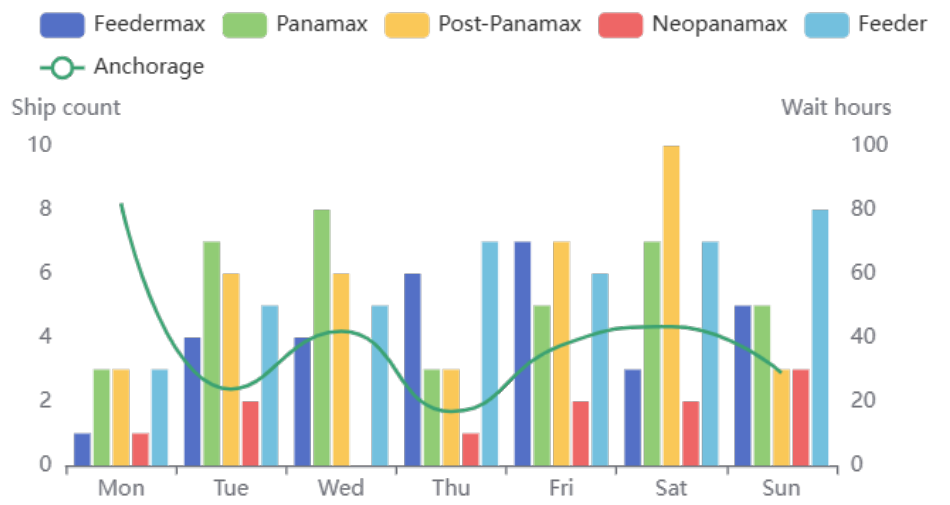
Type	M	T	W	Th	F	Sat	Sun
F.ma.	0	0	0	1	0	0	1
Pan.	2	0	0	0	0	0	0
PPx	0	0	0	1	0	0	0
NPx	0	0	0	1	1	1	1
Fd	1	1	0	0	0	0	0
WT.h.	9	62.3	0.0	10.6	32.1	56.1	43
UlcV	0	0	0	0	0	0	0



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

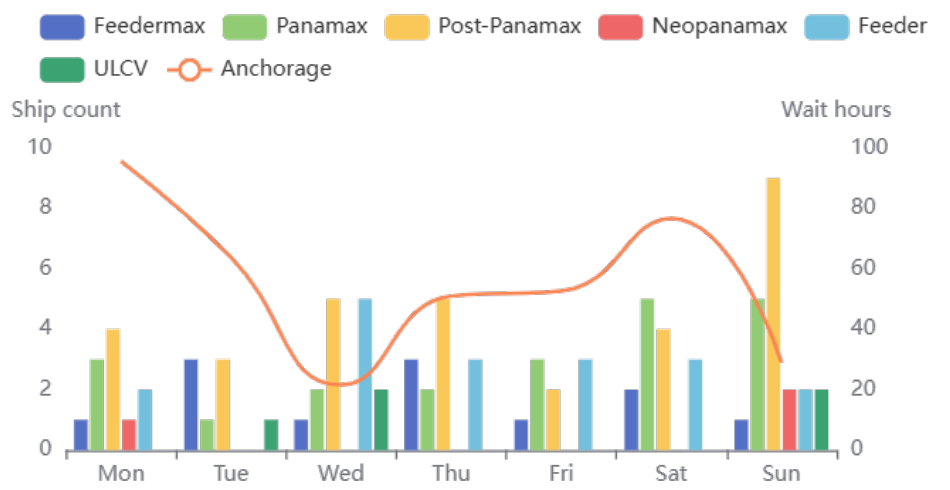
Type	M	T	W	Th	F	Sat	Sun
F.ma.	1	4	4	6	7	3	5
Pan.	3	7	8	3	5	7	5
PPx	3	6	6	3	7	10	3
NPx	1	2	0	1	2	2	3
Fd	3	5	5	7	6	7	8
UlcV	0	0	0	0	0	0	0
WT.h.	82	23.9	42	16.9	37.6	43.5	29



最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

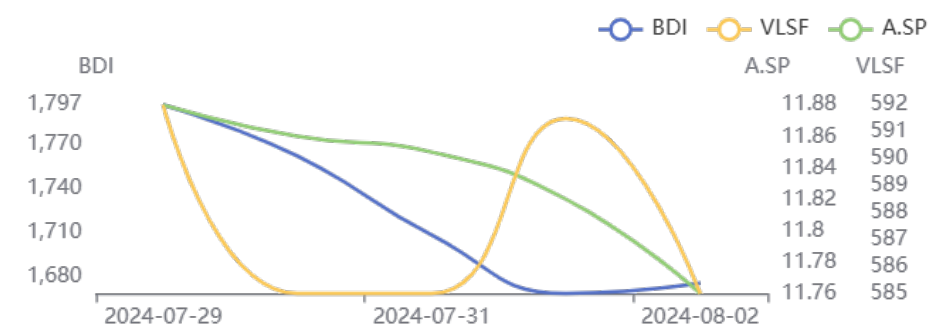
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

Type	M	T	W	Th	F	Sat	Sun
F.ma.	1	3	1	3	1	2	1
Pan.	3	1	2	2	3	5	5
PPx	4	3	5	5	2	4	9
NPx	1	0	0	0	0	0	2
Fd	2	0	5	3	3	3	2
UlcV	0	1	2	0	0	0	2
WT.h.	95.6	63.8	21.6	51	52.7	76.7	29



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

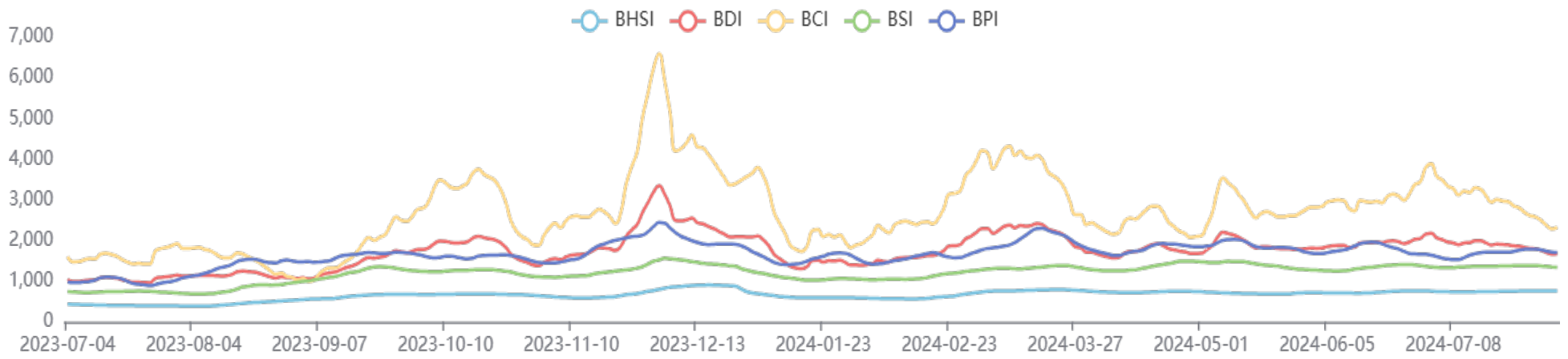
Type	M	T	W	Th	F	Sat	Sun
BDI	1792	1772	1739	1713	1705		
VLSF	592.00	585.00	585.00	591.50	585.00		
A.SP	11.88	11.86	11.85	11.82	11.76	11.8	



第三部分 航运市场 SHIPPING MARKET

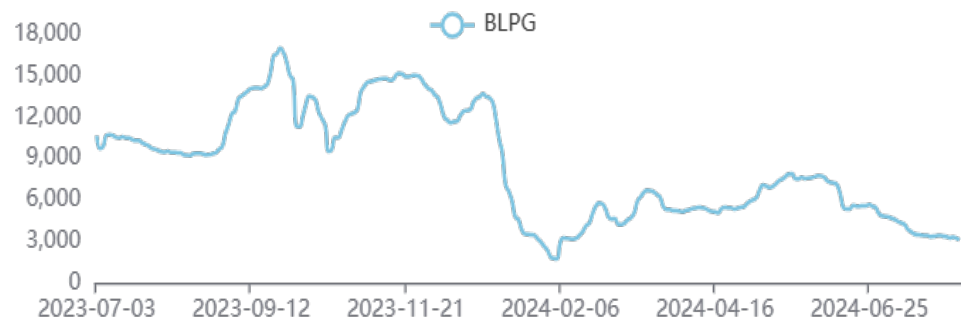
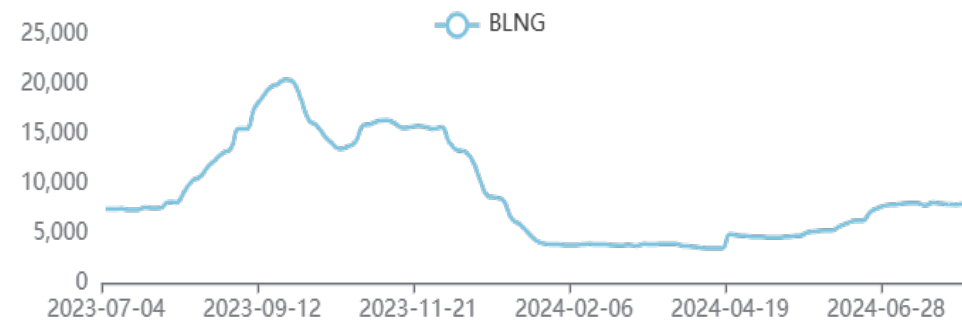
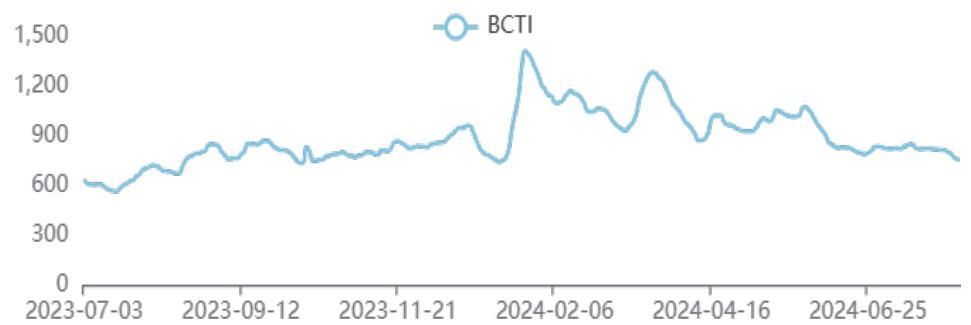
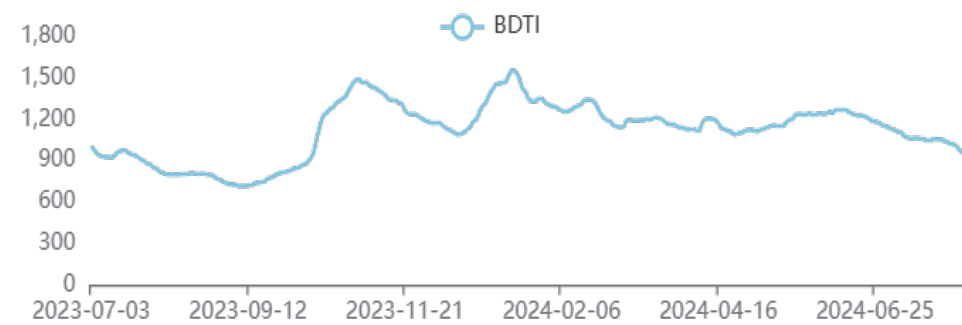
波罗的海干散货指数Baltic Dry Index

Type	PI	WoW	W%	M%	y%
BDI	1675	-133.0	-7.36	-14.8	49.15
BCI	2327	-287.0	-10.98	-30.31	28.71
BPI	1705	-87.0	-4.85	10.28	57.58
BSI	1342	-44.0	-3.17	0.52	91.71
BHSI	759	0.0	0.0	2.29	93.62



能源运价指数Energy Shipping Index

Type	PI	WoW	W%	M%	y%
BDTI	952	-71.0	-6.94	-13.61	15.96
BCTI	755	-59.0	-7.25	-8.15	4.86
BLNG	7943	56.0	0.71	-0.14	-1.67
BLPG	3106	-273.0	-8.08	-32.09	-67.14



第四部分 运力分布 SUPPLY DISTRIBUTION

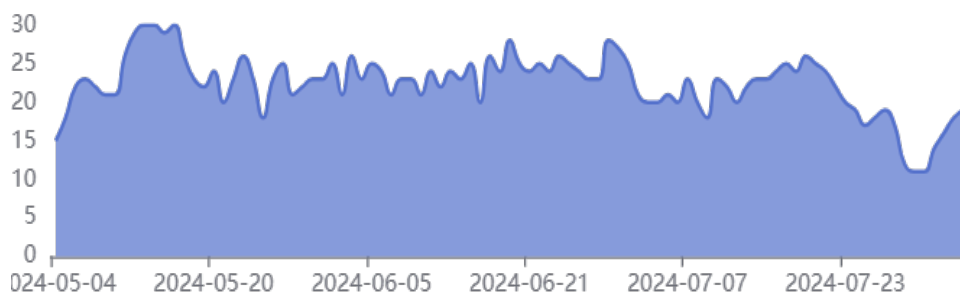


好望角型散货船 Capesize

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.

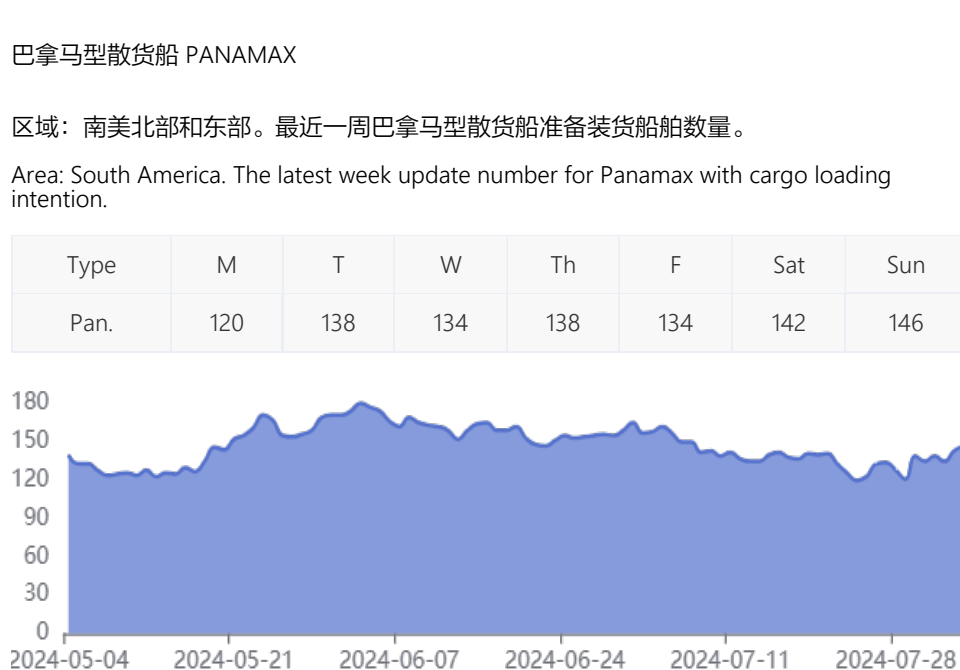
Type	M	T	W	Th	F	Sat	Sun
Cape	12	11	11	14	16	18	19



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	30	32	33	34	32	29

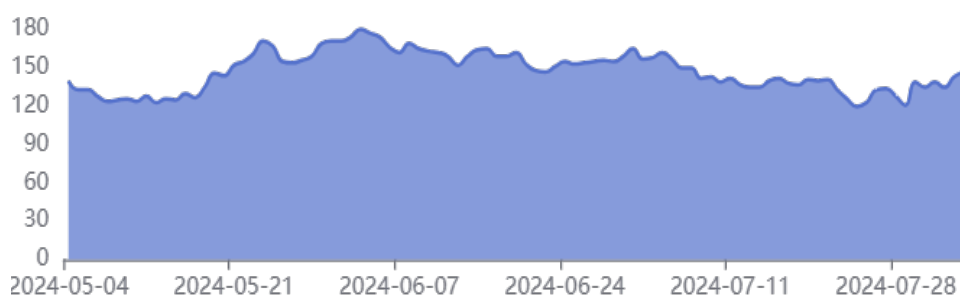


巴拿马型散货船 PANAMAX

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.

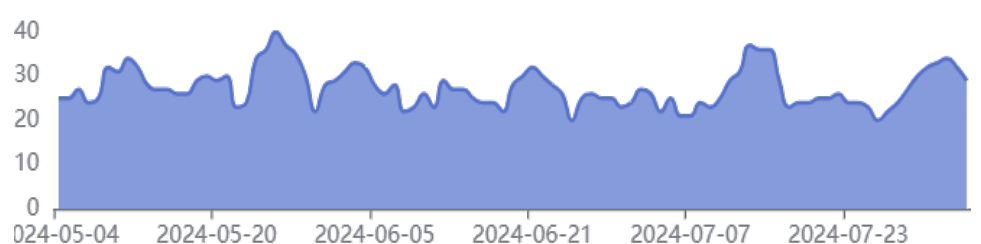
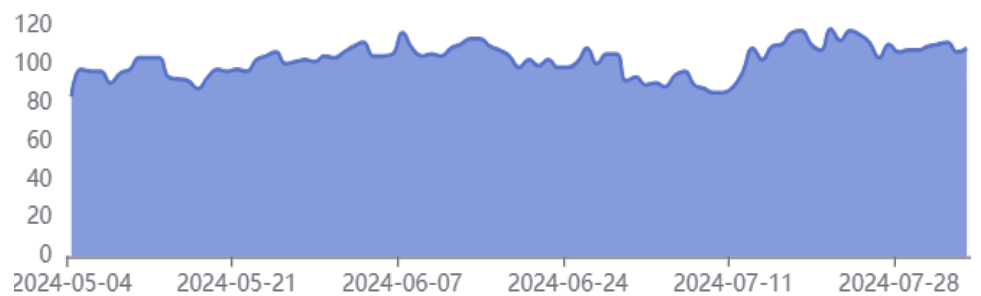
Type	M	T	W	Th	F	Sat	Sun
Pan.	120	138	134	138	134	142	146



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.

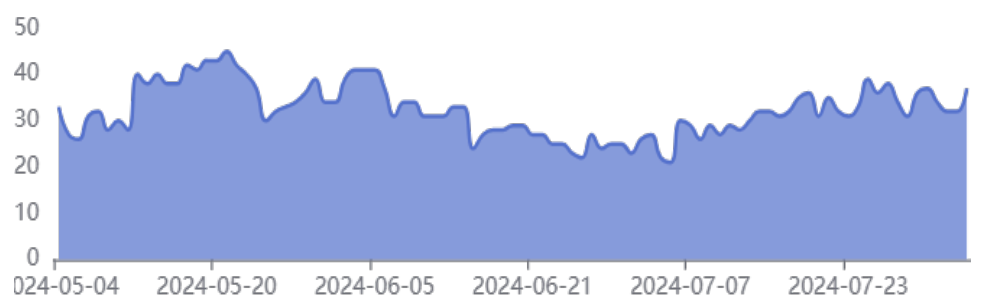
Type	M	T	W	Th	F	Sat	Sun
Cape	107	107	109	110	111	106	108



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.

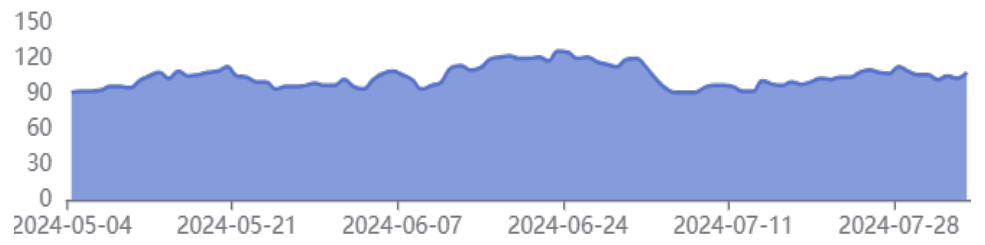
Type	M	T	W	Th	F	Sat	Sun
Pan.	22	22	21	19	21	24	24



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.	109	106	106	102	105	103	108

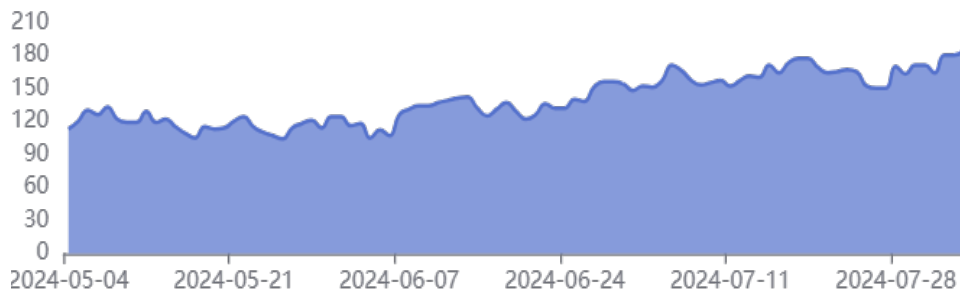


超大灵便型散货 SUPRAMAX

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.

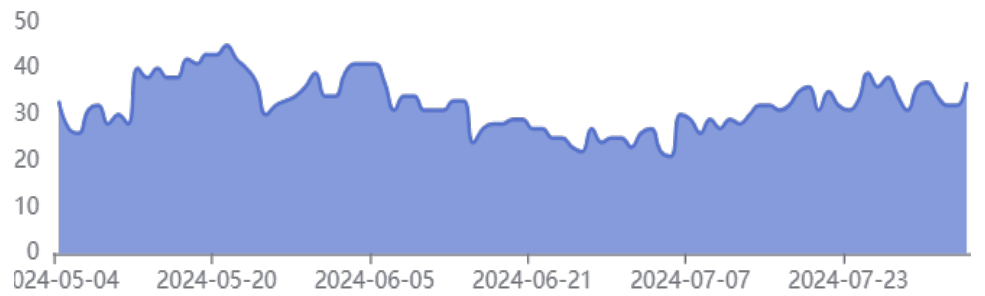
Type	M	T	W	Th	F	Sat	Sun
SMX	163	171	171	164	180	180	184



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.

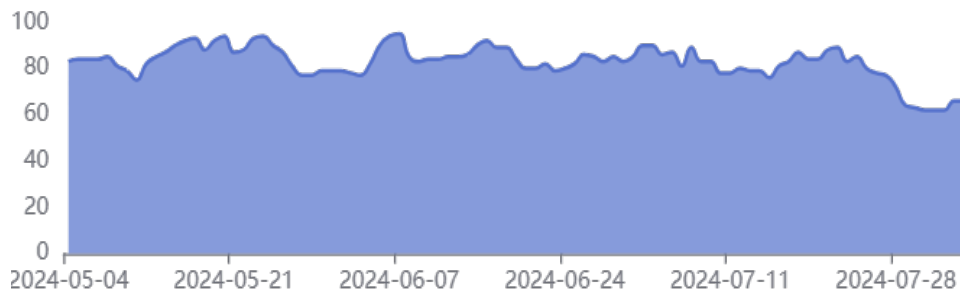
Type	M	T	W	Th	F	Sat	Sun
SMX	31	36	37	34	32	32	37



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.

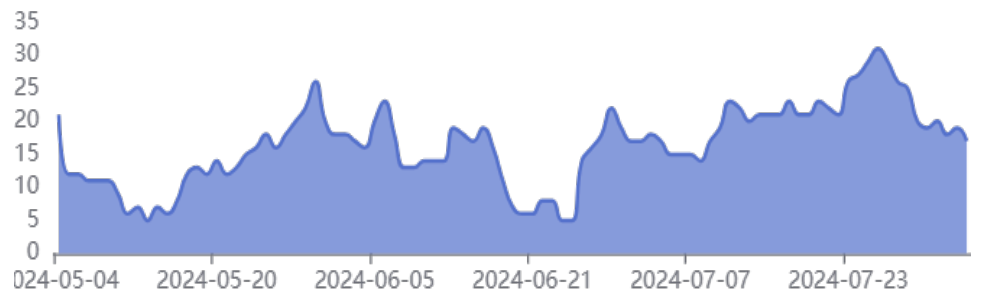
Type	M	T	W	Th	F	Sat	Sun
SMX	25	20	19	20	18	19	17



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	64	63	62	62	62	66	66



第五部分 远期运价协议 FFA

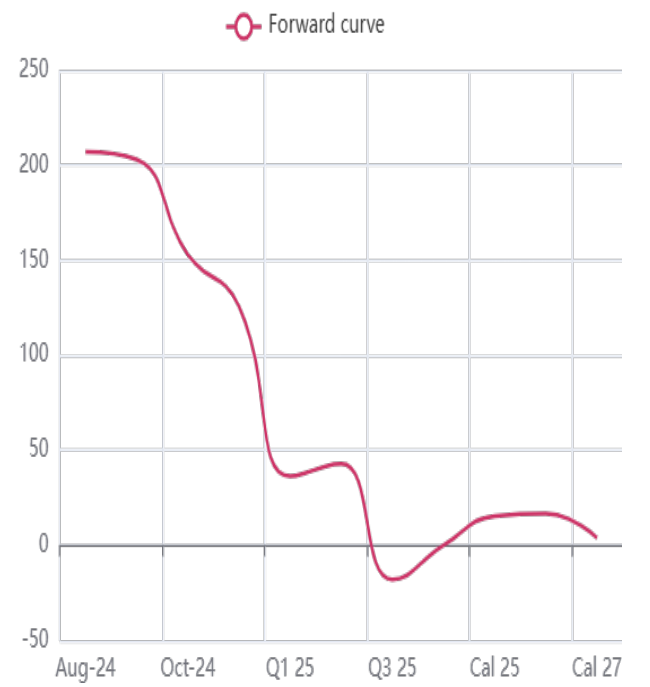
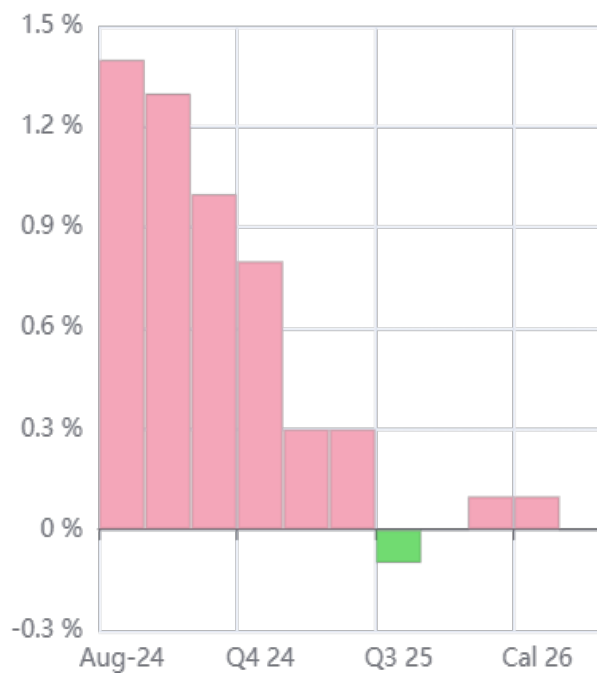
好望角型散货船Capesize

STC	\$/day	WoW	
Aug-24	19,879.00	133.0	0.7 %
Sep-24	23,514.00	282.0	1.2 %
Oct-24	27,021.00	-68.0	-0.3 %
Q4 24	26,311.67	-15.67	-0.1 %
Q1 25	16,371.00	35.0	0.2 %
Q2 25	21,143.00	36.0	0.2 %
Q3 25	24,536.00	36.0	0.1 %
Q4 25	24,407.00	50.0	0.2 %
Cal 25	21,614.25	39.25	0.2 %
Cal 26	21,021.00	35.0	0.2 %
Cal 27	20,121.00	3.0	0.0 %



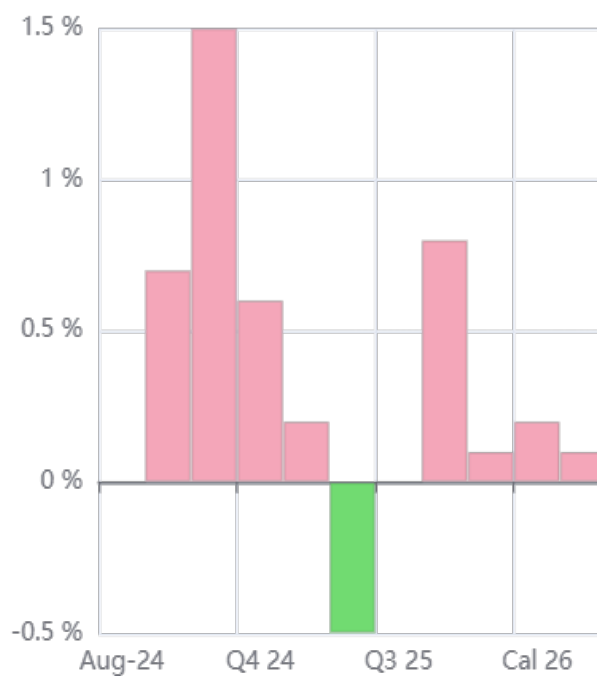
巴拿马型散货船Panamax

4TC	\$/day	WoW	
Aug-24	14,571.00	207.0	1.4 %
Sep-24	15,414.00	203.0	1.3 %
Oct-24	15,871.00	153.0	1.0 %
Q4 24	15,572.33	125.67	0.8 %
Q1 25	12,857.00	36.33	0.3 %
Q2 25	14,161.00	43.0	0.3 %
Q3 25	13,811.00	-18.0	-0.1 %
Q4 25	13,500.00	0.0	0.0 %
Cal 25	13,582.25	15.33	0.1 %
Cal 26	12,671.00	16.75	0.1 %
Cal 27	12,404.00	4.0	0.0 %



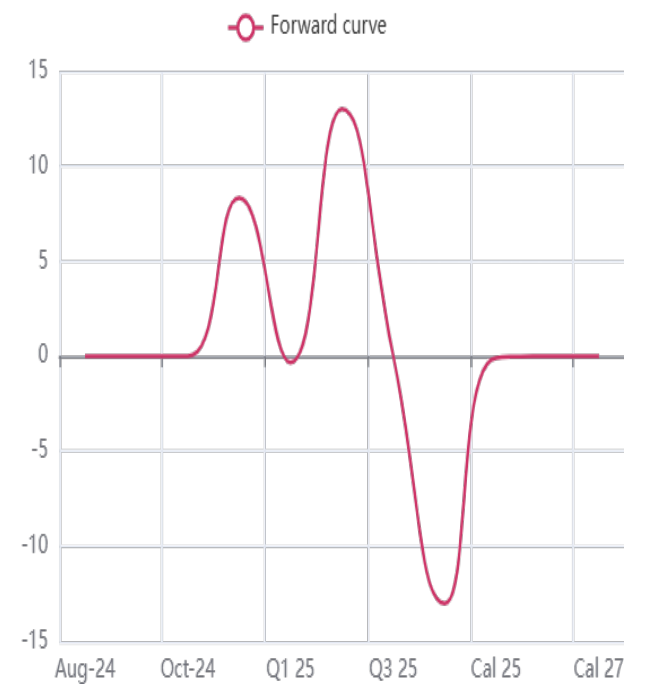
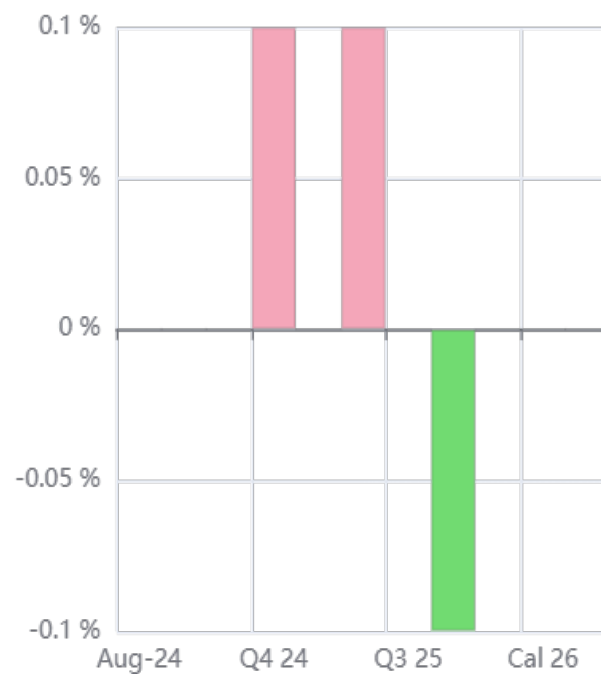
超大灵便型散货船Supramax

10TC	\$/day	WoW	
Aug-24	15,083.00	0.0	0.0 %
Sep-24	15,483.00	104.0	0.7 %
Oct-24	15,742.00	225.0	1.5 %
Q4 24	15,311.00	94.0	0.6 %
Q1 25	12,358.00	19.67	0.2 %
Q2 25	13,588.00	-62.0	-0.5 %
Q3 25	13,617.00	0.0	0.0 %
Q4 25	13,805.00	110.0	0.8 %
13,342.00	Cal 25	16.92	0.1 %
Cal 26	12,563.00	30.0	0.2 %
Cal 27	12,258.00	12.0	0.1 %



灵便型散货船Handysize

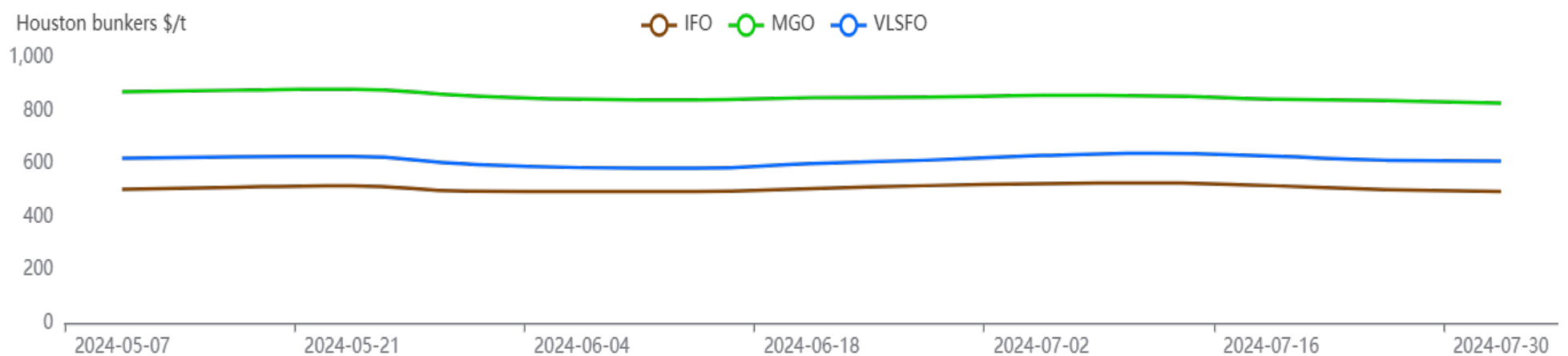
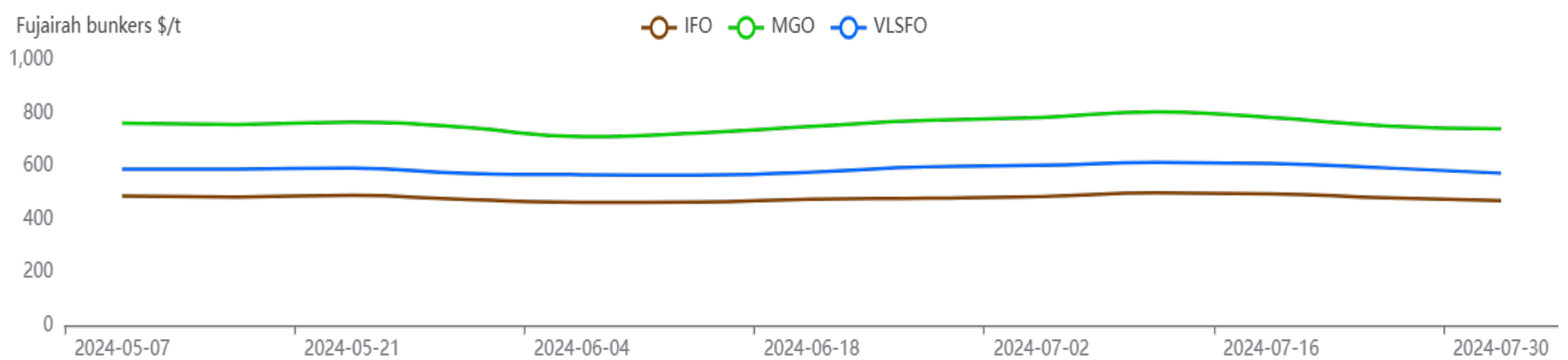
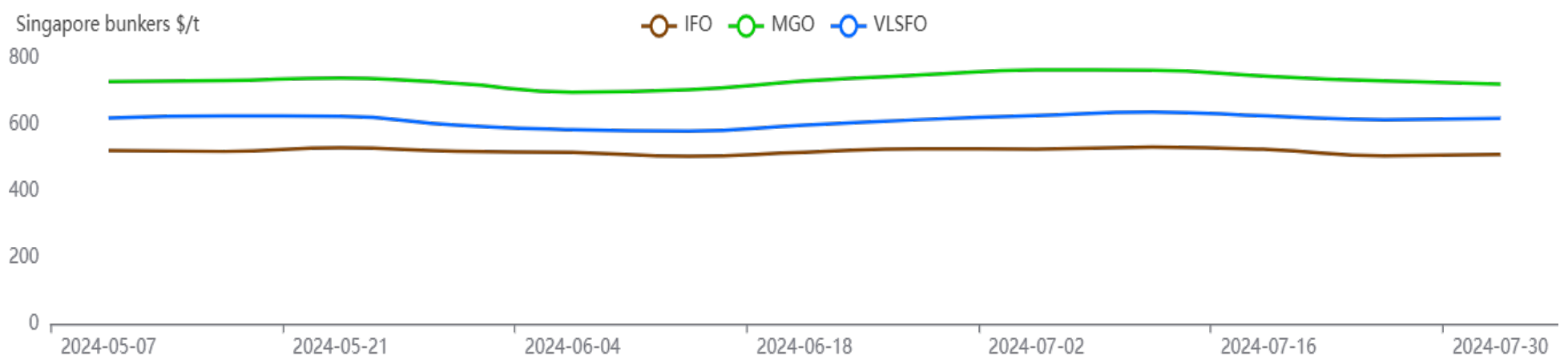
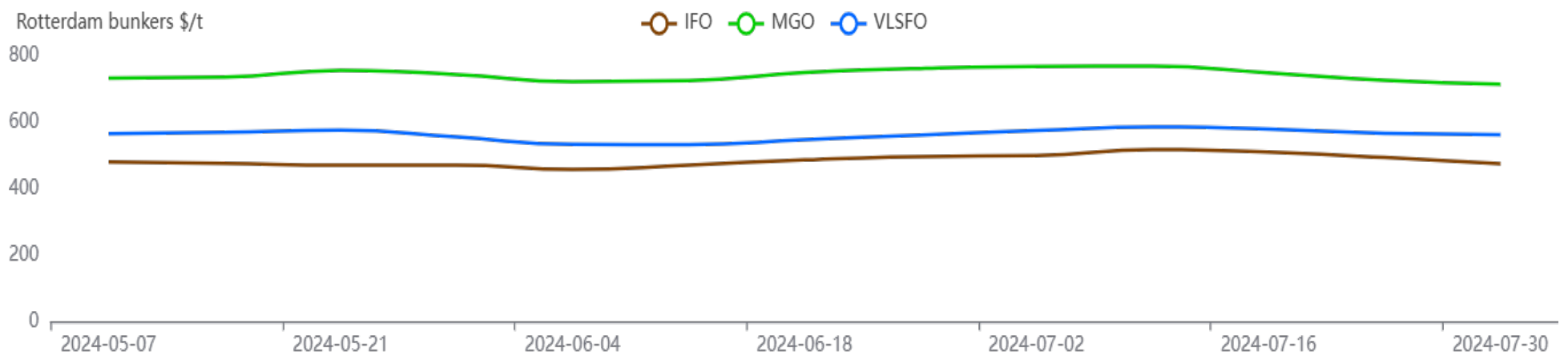
7TC	\$/day	WoW	
Aug-24	14,138.00	0.0	0.0 %
Sep-24	14,450.00	0.0	0.0 %
Oct-24	14,400.00	0.0	0.0 %
Q4 24	14,212.67	8.33	0.1 %
Q1 25	11,338.00	-0.33	0.0 %
Q2 25	12,563.00	13.0	0.1 %
Q3 25	12,425.00	0.0	0.0
Q4 25	13,026.00	-13.0	-0.1 %
Cal 25	12,338.00	-0.08	0.0 %
Cal 26	11,738.00	0.0	0.0 %
Cal 27	11,525.00	0.0	0.0 %



第六部分 燃油价格 BUNKER PRICE

MP	LO	HO	MO	SP	WoW	W%	M%
zhoushan	617.0	524.0	770.0	93.0	6.0	6.9	29.17
Singapore	619.5	510.5	723.0	109.0	0.0	0.0	6.86
Rotterdam	563.5	476.0	716.0	87.5	14.5	19.86	16.67
Fujairah	574.0	471.0	741.0	103.0	-10.0	-8.85	-12.34
Houston	611.0	496.0	829.5	115.0	4.0	3.6	8.49

(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	-2.0	-1.0	-2.94	-21.15
Maize		202.0	5.0	2.54	5.76	-12.98
Soybeans		213.0	-3.0	-1.39	-4.91	-24.49
Rice		247.0	0.0	0.0	-1.59	13.06
Barley		213.0	1.0	0.47	-0.47	-8.17
Energy		Index	+/-	Weekly	Monthly	YTD
Crude Oil	USD/Bbl	77.34	-1.56	-1.98	-5.8	1.06
Brent	USD/Bbl	81.29	-1.68	-2.02	-5.05	0.91
Natural Gas	USD/MMBtu	2.07	-0.1	-4.61	-19.77	-23.62
Gasoline	USD/Gal	2.47	0.01	0.41	-2.37	-11.79
Heating Oil	USD/Gal	2.43	0.0	0.0	-5.08	-11.31
Ethanol	USD/Gal	1.77	-0.05	-2.75	-4.84	-28.63
Naphtha	USD/T	688.79	-1.1	-0.16	3.9	20.98
Propane	USD/Gal	0.79	0.0	0.0	3.95	25.4
Uranium	USD/Lbs	82.45	-1.9	-2.25	-3.85	47.89
Methanol	CNY/T	2500.0	34.0	1.38	-0.87	12.82
TTF Gas	EUR/MWh	33.41	1.88	5.96	-4.13	16.61
UK Gas	GBP/thm	78.21	5.21	7.14	-5.34	8.41
Industrial		Index	+/-	Weekly	Monthly	YTD
Copper	USD/Lbs	4.08	-0.13	-3.09	-7.27	7.94
Coal	USD/T	139.25	4.15	3.07	4.54	4.7
Steel	CNY/T	3055.0	-181.0	-5.59	-8.81	-18.23
Iron Ore	USD/T	106.86	-1.59	-1.47	0.33	-7.88
Aluminum	USD/T	2267.5	-71.0	-3.04	-10.64	2.63
Lithium	CNY/T	85500.0	0.0	0.0	-6.56	N/A
Metals		Index	+/-	Weekly	Monthly	YTD
Gold	USD/t.oz	2391.4	-11.6	-0.48	2.86	21.81
Silver	USD/t.oz	28.0	-1.1	-3.78	-4.11	14.29
Platium	USD/t.oz	943.0	-17.2	-1.79	-5.04	-1.55
Currencies		Index	+/-	Weekly	Monthly	YTD
EUR/USD		1.08	-0.01	-0.92	0.0	-2.7
USD/CNY		7.27	-0.02	-0.27	-0.41	0.83

第八部分 本周话题 WEEKLY TOPIC



2024年强劲的集装箱航运市场

2024年到目前，集装箱运输市场表现强势，第二季度更是显著上涨，使集装箱的运费和租船水平都达到了新冠疫情后的次新高水平。上半年红火的集装箱市场主要还是受益于红海不安全的干扰，其它多个因素也起到了推波助澜的作用。许多发货商提前装载发运货物以避免红海的干扰，导致高峰贸易量提前出现，同时基础的贸易量增长也很强劲，因错乱的班期计划导致的拥堵热点进一步影响了集装箱运力供给。然而，最近该市场动能有所缓和，运费在第三季度可能会略有软化。

第二季度集装箱运费市场经历了显著增长，到7月初，SCFI现货运费指数达3734点，比第一季度末水平翻了一番，并较去年12月初上涨269%。运费的上涨反映了船舶绕行红海提高了成本和占用更多的集装箱船运力，同时也得益于国际贸易规模的改善。

正在进行的第三季度，集装箱船租船费还是有显著上涨，各种集装箱船型的租金水平均有明显上涨，租期也持续增长，平均租期已从去年12月的5个月上升到目前的约18个月时间。

红海安全全因数扰动仍然是集装箱市场趋势的关键驱动因素。2024年上半年，苏伊士运河的集装箱船通行量下降了约90%。在某些区域，港口的压力加大，全球集装箱港口拥堵明显升高，近期有高达3%左右的集装箱运力因为港口拥堵被占用。

在集装箱新造船方面，2024年初到目前，集装箱新造船订单数量下降了23%，对应TEU减少了13%。集装箱船二手市场也非常活跃，第二季度有71艘集装箱船约31万TEU成交，价格也上升了。

当下集装箱船队正在经历快速增长和新船交付比较集中的阶段，2024年上半年船队增长5.7%，预计全年增长约10%。然而集装箱拆船市场依然疲软，2024年上半年仅有36艘约5.1万TEU集装箱船被拆解。

目前国际局势并不明朗，巴以冲突好像纠缠不清，可见扰动的红海将继续对下半年的集装箱市场产生影响，运费很可能保持高位运行，尽管近期有所软化。展望未来，2025年可能是一个挑战性的年份，红海事件不会久而不决，供需关系可能会出现新局面，那时市场可能面临压力。

Since the beginning of 2024, the container market has shown strong performance, with a significant increase in the second quarter. This surge has pushed container freight rates and charter levels to a new post-COVID high. The booming container market in the first half of the year primarily benefited from disruptions in the Red Sea due to security concerns, although several other factors contributed as well. Many shippers loaded and dispatched goods ahead of time to avoid disturbances in the Red Sea, resulting in an earlier peak in trade volume. The underlying trade volume was robust, but schedule disruptions caused congestion hotspots, further affecting container shipping capacity. Recently, however, market momentum has eased, and freight rates may soften slightly in the third quarter.

In the second quarter, the container freight experienced notable growth. By early July, the SCFI spot freight index reached 3,734 points, doubling from the end of the first quarter and up 269% from early December last year. This increase in freight rates reflects the higher costs associated with vessels rerouting around the Red Sea, which also uses more container shipping capacity, along with improvements in international trade volumes.

In the ongoing third quarter, container ship charter rates have seen some increases, with chartering rates for various types of container vessels rising markedly and average charter duration extending from five months last December to approximately 18 months now.

Security disturbances in the Red Sea remain a key driver of trends in the container market. In the first half of 2024, the volume of container ships transiting the Suez Canal dropped by about 90%. Some regions are experiencing increased pressure on ports, with global container port congestion significantly rising; recently, up to 3% of container shipping capacity has been tied up due to port congestion.

Regarding new container ship construction, the number of new builds has declined by 23% from the start of 2024 to now, equating to a reduction of 13% in TEU capacity. The second-hand container ship market is also very active, with 71 container ships measuring around 310,000 TEU sold in the second quarter, and prices have risen.

Currently, the container fleet is undergoing rapid growth with a concentrated delivery of new ships. In the first half of 2024, the fleet expanded by 5.7%, with an expected annual growth rate of about 10%. However, the container demolition market remains weak, with only 36 container ships, totalling approximately 51,000 TEU, being scrapped in the first half of 2024.

The international situation remains uncertain, with the Israel-Palestine conflict seemingly complex and tangled. It is evident that disturbances in the Red Sea will continue to impact the container market in the second half of the year, and freight rates are likely to remain high, despite some recent softening. Looking ahead, 2025 could be a challenging year, as the Red Sea issues may not be resolved quickly, potentially leading to a new supply-demand dynamic and market pressures.

