hiFleet 船队在线

2024年
第35周市场周报

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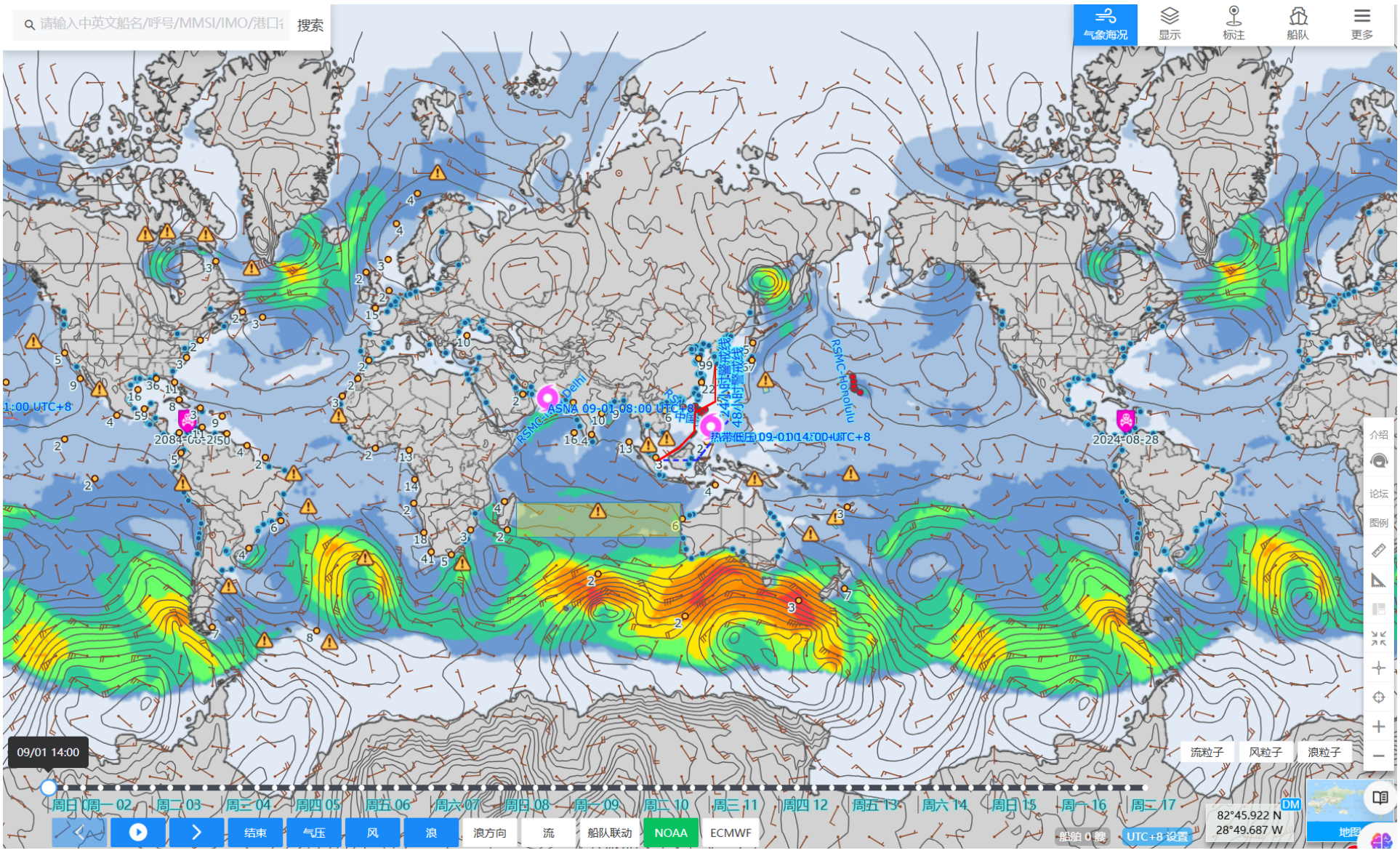
上海迈利船舶科技有限公司

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787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 787 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3-4级，相关海域中浪；台湾海峡风力将经历6-7级，台湾海峡大浪；南海大部海域风力3-4级，轻浪。目前有两个热带低压从菲律宾东部正向南中国靠近。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 gentle breeze with moderate wave. The wind in the Taiwan Strait will become strong and sea there experience rough. In most of the South China Sea the wind is gentle with smooth sea. There are Two TD approaching south of China from east of Philippine.

海盗事件 Piracy

8月28日，哥伦比亚，卡塔赫纳锚地。一艘锚泊的油轮上的值班水手听到船艏楼附近有噪音。在调查中，他注意到一艘船有四个人靠近锚链，一个人在锚链管里试图进入。通知值班驾驶员，消防泵启动。看到船员们的警觉，这些人逃走了。船员向港口控制中心和海岸警卫队报告事故。一艘巡逻艇搜查了油轮周围的水域。28.08.2024: 0730 UTC: Posn: 10:19.35N – 075:32.10W, Cartagena Inner Anchorage, Colombia. Duty AB onboard an anchored tanker heard noises near the forecastle. On investigating he noticed a boat with four persons near the anchor chain and one person in the hawsepipe attempting to gain access. OOW notified and fire pump activated. Seeing the crew alertness, the persons escaped. Incident reported to port control and coast guard. A patrol boat searched the waters around the tanker.

海上事件 Marine Incidents

8月27日，在土耳其，一艘6300载重吨（2019年建造）的件杂货船NAVIS-2上发生煤气中毒事件，导致两名俄罗斯海员遇难，当时该船在班迪尔马湾的巴利克西尔附近停泊。据说，一名船员在舱口盖打开后受毒气影响，掉进了狭窄的空间里，而另外一名船员是怎么进入货舱而死亡的原因不明。On August 27, in Turkey, a gas poisoning incident occurred aboard the cargo ship NAVIS-2, which has a deadweight tonnage of 6,300 and was built in 2019. The vessel was anchored near Bal□kesir in the Bandirma Bay when the incident happened, resulting in the deaths of two Russian sailors. Reportedly, one crew member was affected by toxic gas after the hatch cover was opened and fell into a confined space, while the circumstances surrounding the second crew member's entry into the cargo hold and subsequent death remain unclear.

其它 Others

没有 Nil

备注 Remark

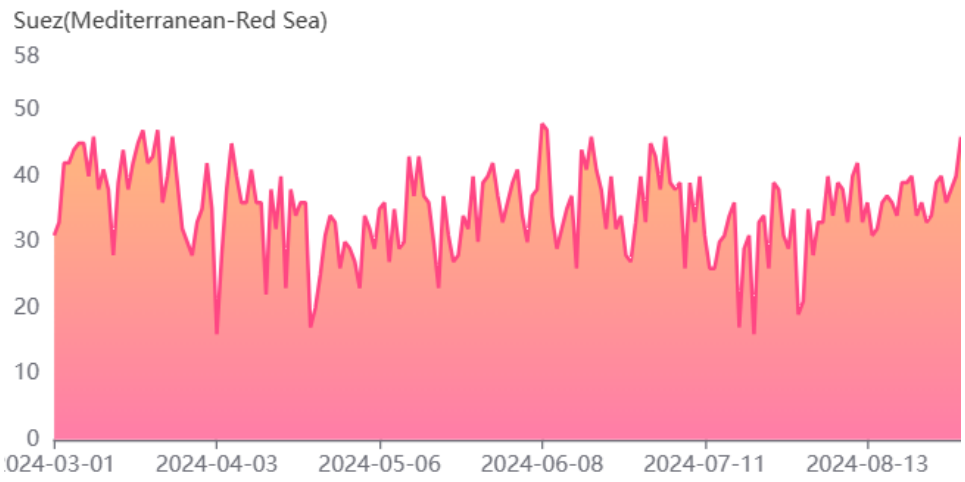
本报告数据截止时间为2024年9月1日北京时间17点；所有数据和或观点仅供参考，在任何情况下本公司及其员工不承担任何风险。 The data deadline for this report is Beijing time 17 hours on Sep 1st of 2024; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

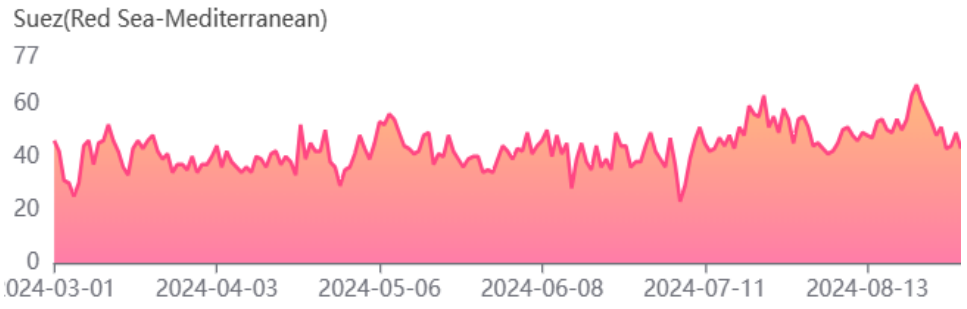
第二部分 航运数据 SHIPPING DATA

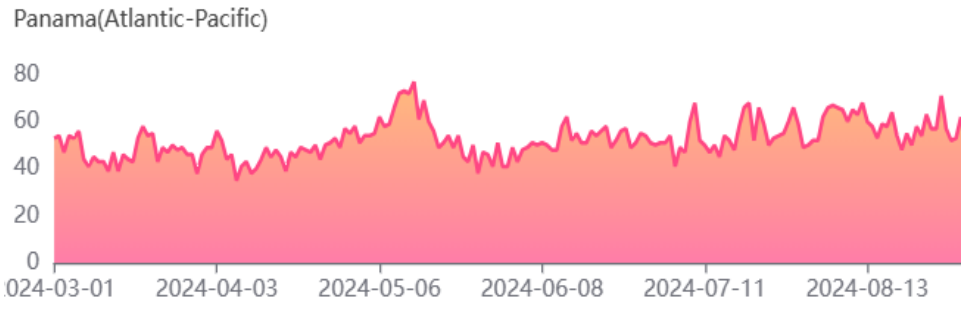
最近一周船舶运河/河口锚地等待数量

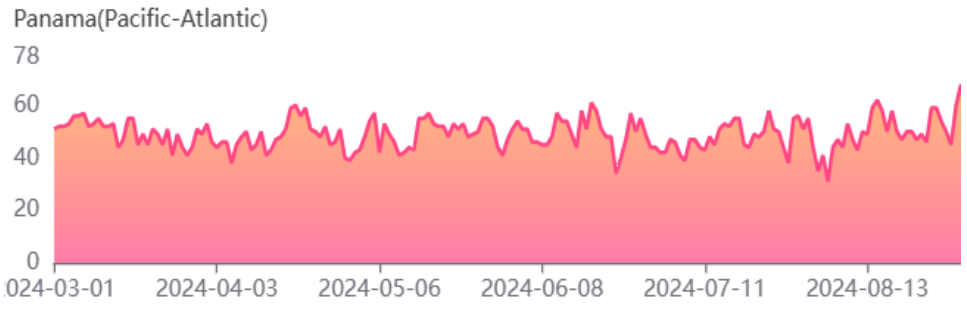
Latest Week Update Vessel Waiting Numbers Information in Anchorages of Canals and Rivers

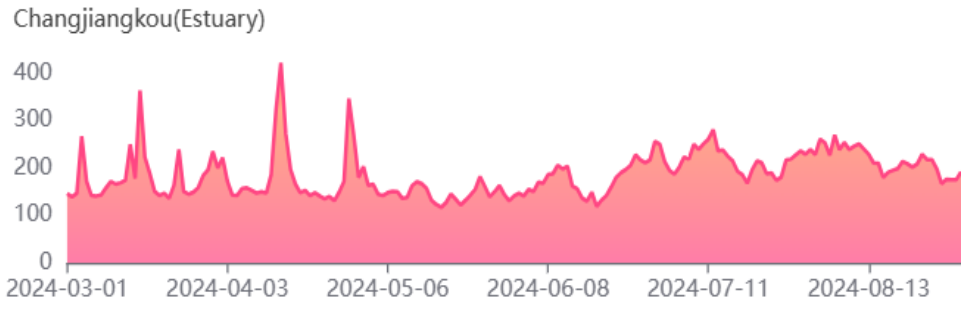
Canal/Riv.	P.N.	M.N.	WoW	MoM
Suez.Red	43	1453	-67	40
Miss.Riv.	6	98	11	12
CJK	192	6217	-155	-210
Pa.Atlan.	62	1725	26	121
Colum.Riv.	3	92	-9	-81
Suez.Med.	46	1068	15	189
Pa.Pac.	68	1470	44	77
ZJK	59	2876	-55	-390

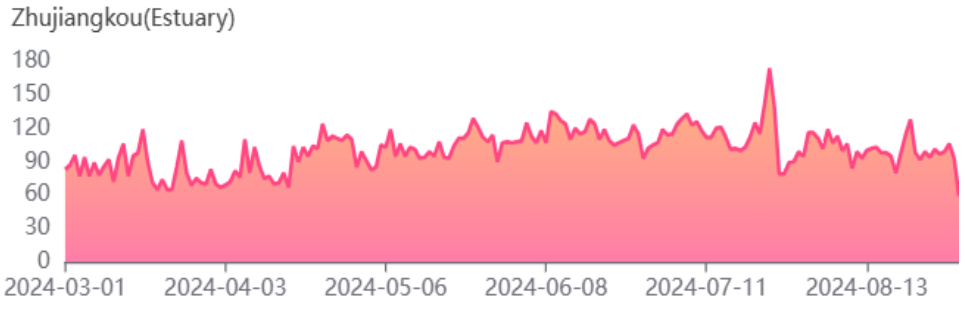


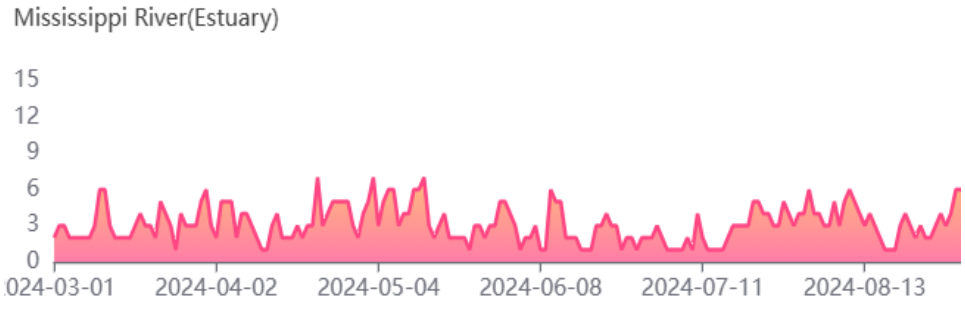


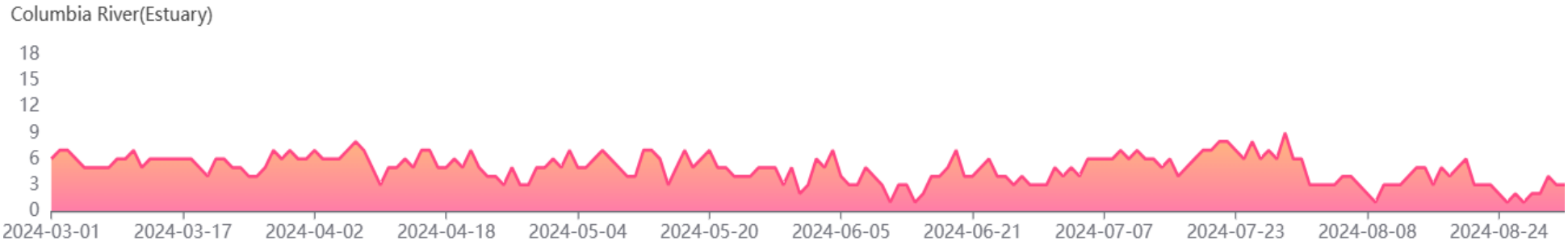










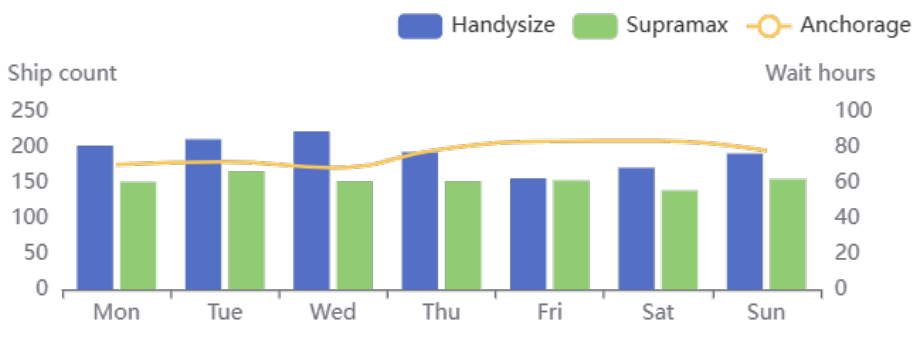


(P.N-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

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

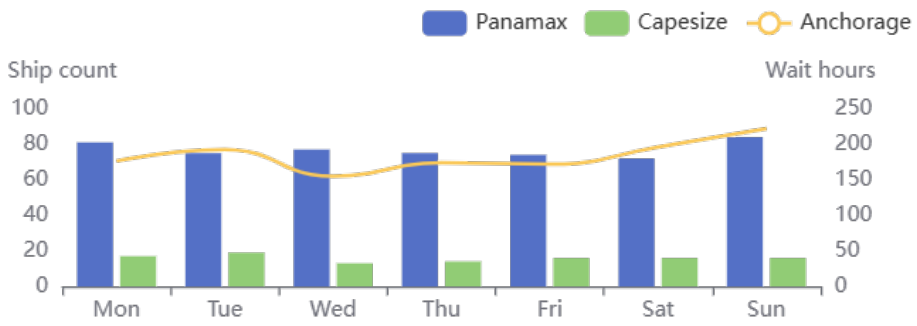
Type	M	T	W	Th	F	Sat	Sun
HDY	202	211	222	193	156	171	191
SMX	151	166	152	152	153	139	155
WT.h.	70.2	71.9	68.5	78.9	83.3	83.6	78



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

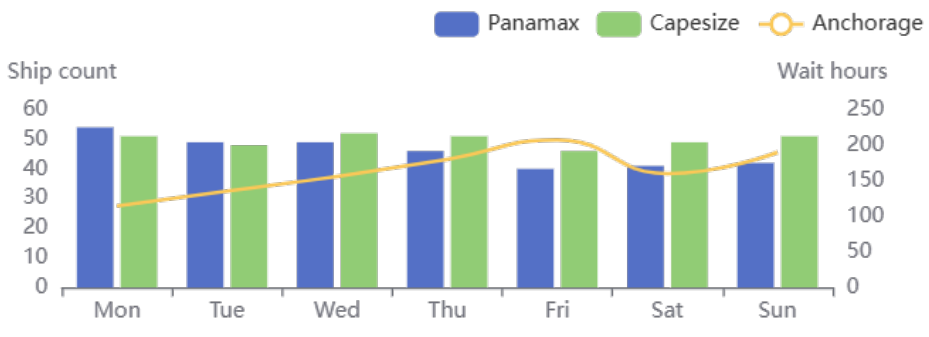
Type	M	T	W	Th	F	Sat	Sun
Pan.	81	75	77	75	74	72	84
Cap	17	19	13	14	16	16	16
WT.h.	176.3	192.4	154.9	174.1	171.8	195.8	222



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

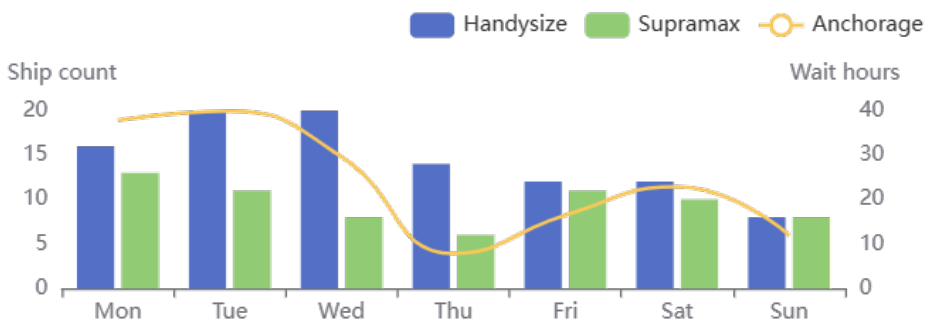
Type	M	T	W	Th	F	Sat	Sun
Pan.	54	49	49	46	40	41	42
Cap	51	48	52	51	46	49	51
WT.h.	114.4	135.4	156.2	180.2	207.4	160	190



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

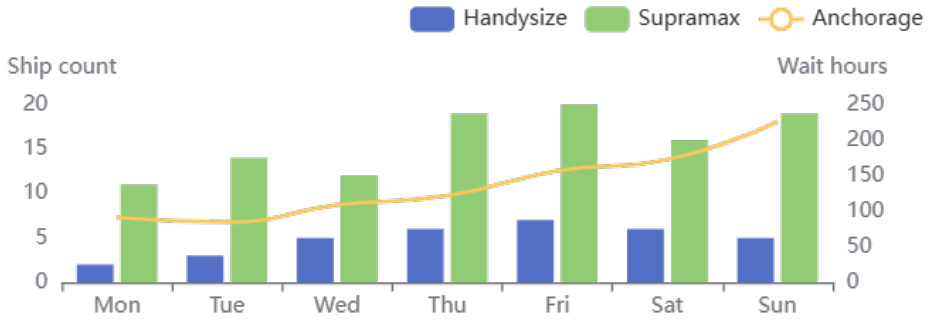
Type	M	T	W	Th	F	Sat	Sun
HDY	16	20	20	14	12	12	8
SMX	13	11	8	6	11	10	8
WT.h.	37.8	39.9	29.6	7.85	16.5	22.9	12



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

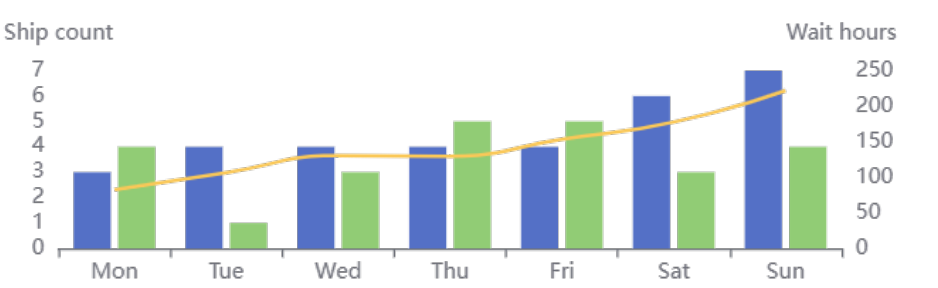
Type	M	T	W	Th	F	Sat	Sun
HDY	2	3	5	6	7	6	5
SMX	11	14	12	19	20	16	19
WT.h.	91.7	84.8	108.8	121.9	156.8	172.7	226



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

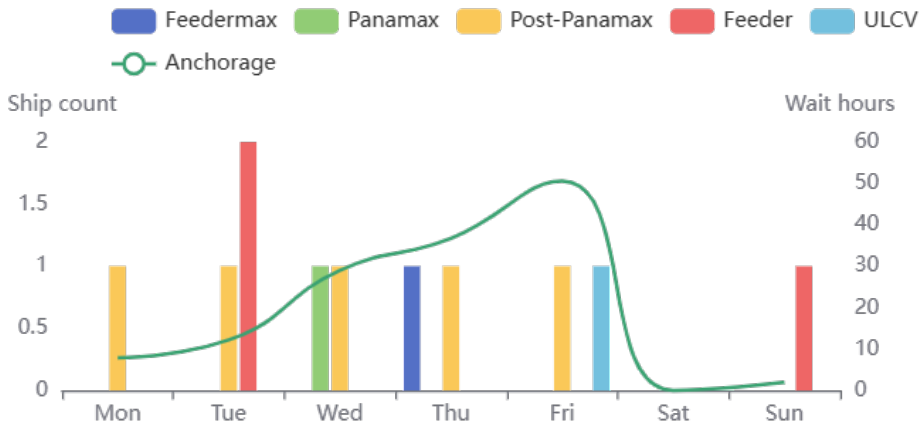
Type	M	T	W	Th	F	Sat	Sun
HDY	3	4	4	4	4	6	7
SMX	4	1	3	5	5	3	4
WT.h.	82.7	106.7	130.7	129.7	153.7	177.7	222



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

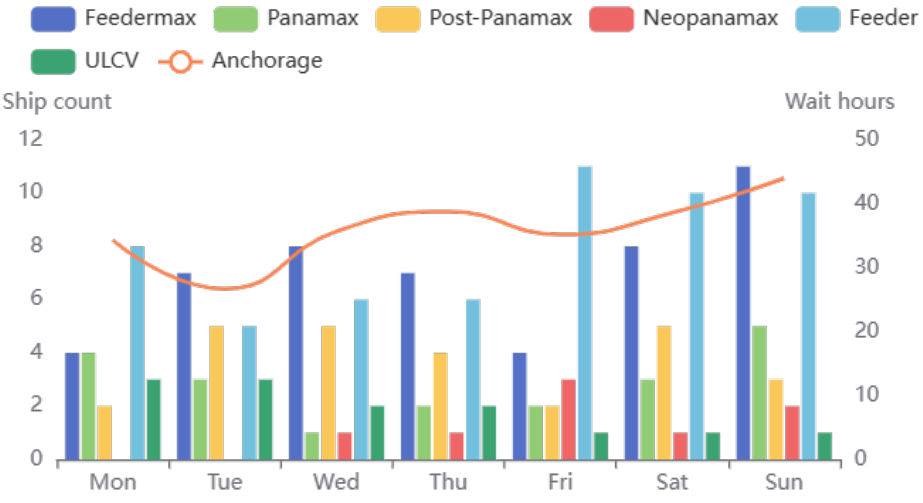
Type	M	T	W	Th	F	Sat	Sun
F.ma.	0	0	0	1	0	0	0
Pan.	0	0	1	0	0	0	0
PPx	1	1	1	1	1	0	0
NPx	0	0	0	0	0	0	0
Fd	0	2	0	0	0	0	1
WT.h.	7.9	12.2	29.0	36.75	50.55	0.0	2
Ulcv	0	0	0	0	1	0	0



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

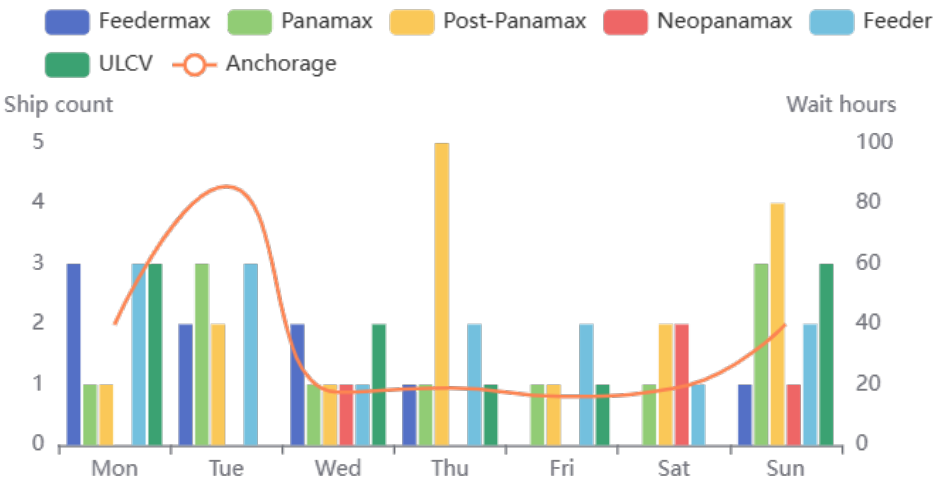
Type	M	T	W	Th	F	Sat	Sun
F.ma.	4	7	8	7	4	8	11
Pan.	4	3	1	2	2	3	5
PPx	2	5	5	4	2	5	3
NPx	0	0	1	1	3	1	2
Fd	8	5	6	6	11	10	10
Ulcv	3	3	2	2	1	1	1
WT.h.	34.3	26.7	35.7	38.8	35.2	38.6	44



最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

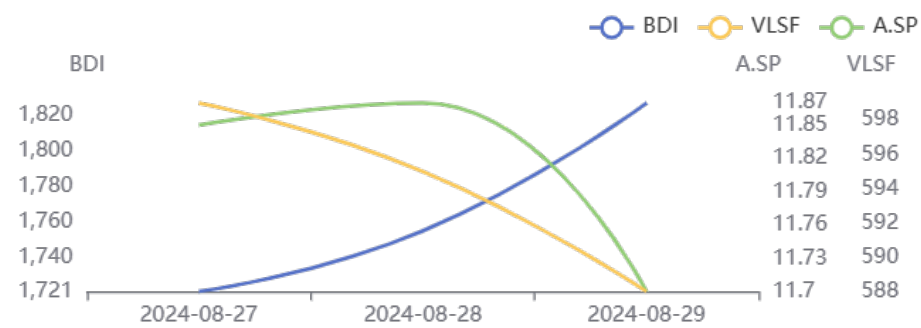
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

Type	M	T	W	Th	F	Sat	Sun
F.ma.	3	2	2	1	0	0	1
Pan.	1	3	1	1	1	1	3
PPx	1	2	1	5	1	2	4
NPx	0	0	1	0	0	2	1
Fd	3	3	1	2	2	1	2
Ulcv	3	0	2	1	1	0	3
WT.h.	39.9	85.7	17.5	18.9	16.1	18.8	40



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

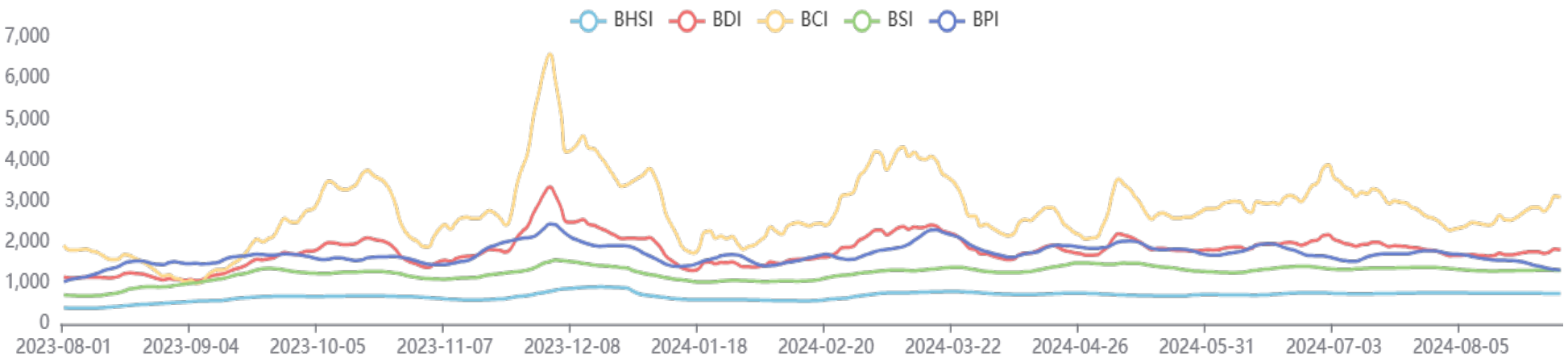
Type	M	T	W	Th	F	Sat	Sun
BDI	1381	1350	1331	1316			
VLSF	592.00	599.00	595.00	588.00			
A.SP	11.91	11.85	11.87	11.7	11.79	11.85	



第三部分 航运市场 SHIPPING MARKET

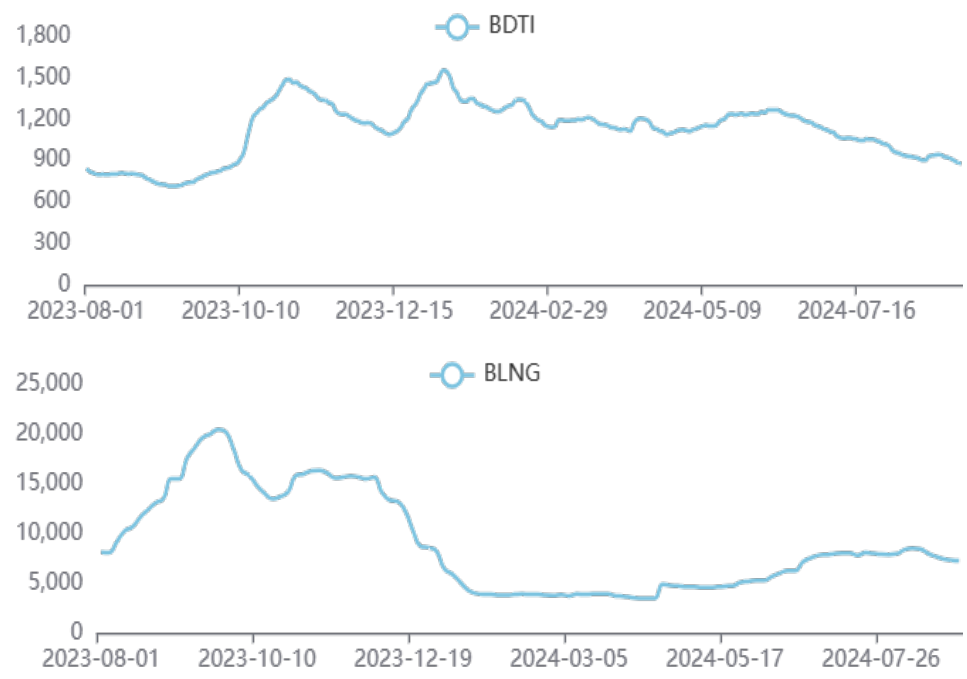
波罗的海干散货指数Baltic Dry Index

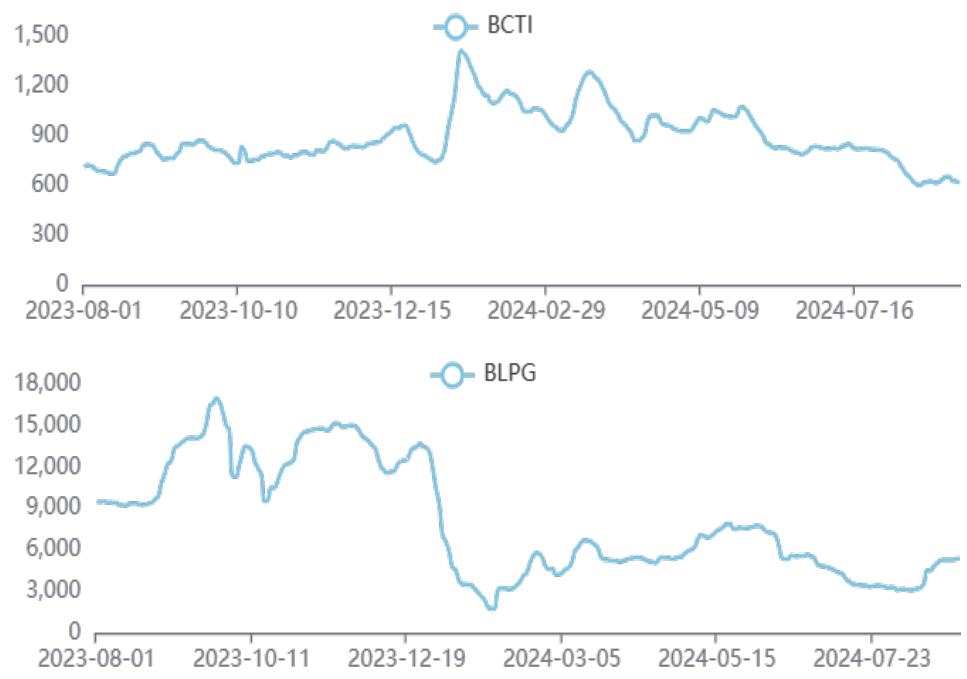
Type	PI	WoW	W%	M%	y%
BDI	1814	52.0	2.95	8.3	65.81
BCI	3099	248.0	8.7	33.18	175.96
BPI	1316	-98.0	-6.93	-22.82	-13.48
BSI	1306	-12.0	-0.91	-2.68	38.64
BHSI	744	-9.0	-1.2	-1.98	41.98



能源运价指数Energy Shipping Index

Type	PI	WoW	W%	M%	y%
BDTI	881	-39.0	-4.24	-7.46	15.31
BCTI	614	-38.0	-5.83	-18.68	-27.59
BLNG	7250	-170.0	-2.29	-8.72	-53.24
BLPG	5359	77.0	1.46	72.54	-45.73





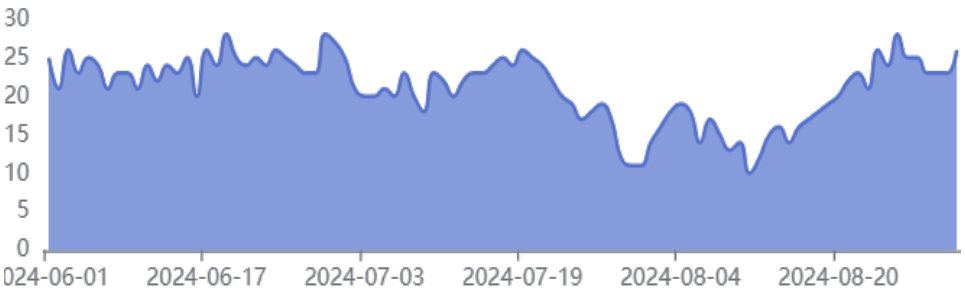
第四部分 运力分布 SUPPLY DISTRIBUTION

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.

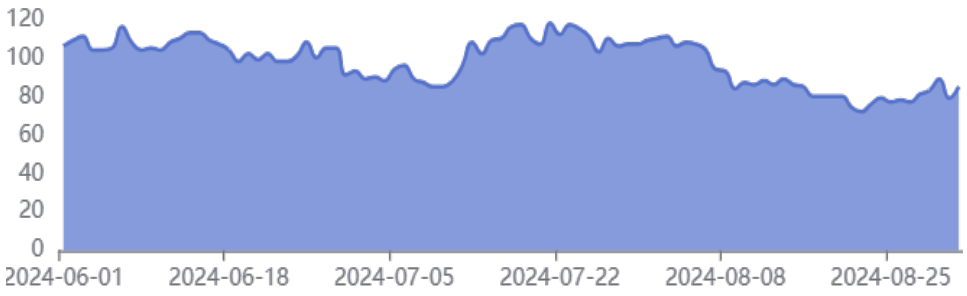
Type	M	T	W	Th	F	Sat	Sun
Cape	28	25	25	23	23	23	26



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.

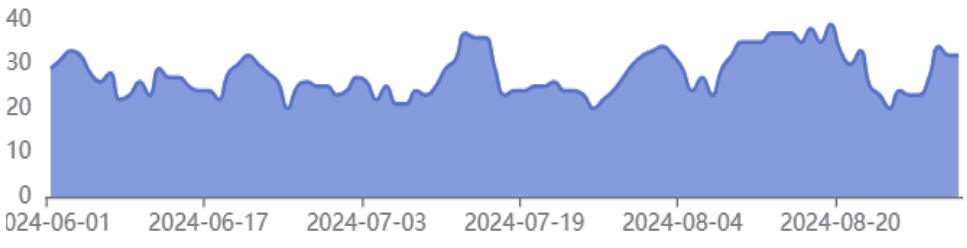
Type	M	T	W	Th	F	Sat	Sun
Cape	78	77	81	83	89	79	85



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	23	23	27	34	32	32

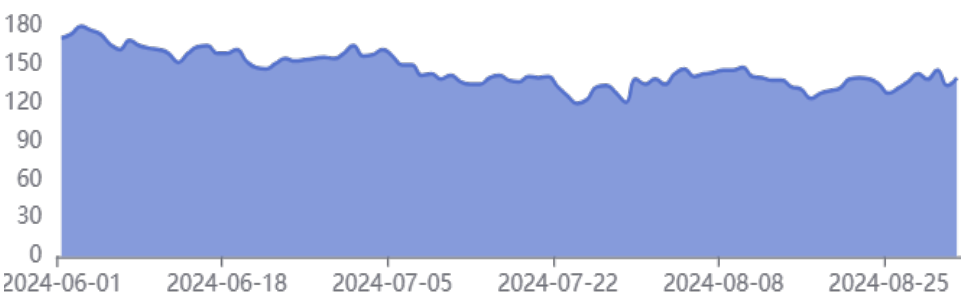


巴拿马型散货船 PANAMAX

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.

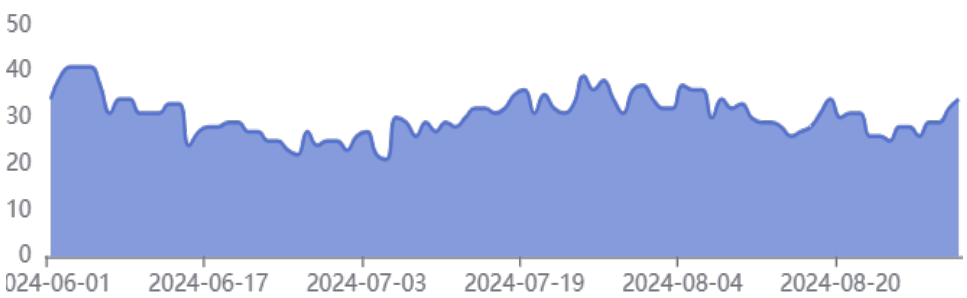
Type	M	T	W	Th	F	Sat	Sun
Pan.	131	136	142	138	145	133	139



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.

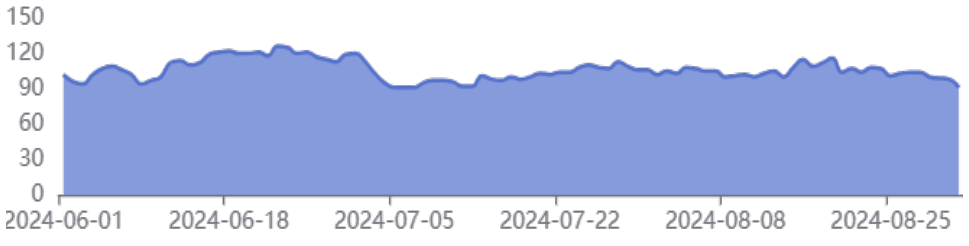
Type	M	T	W	Th	F	Sat	Sun
Pan.	21	23	18	20	19	18	18



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.	103	104	104	100	99	98	91

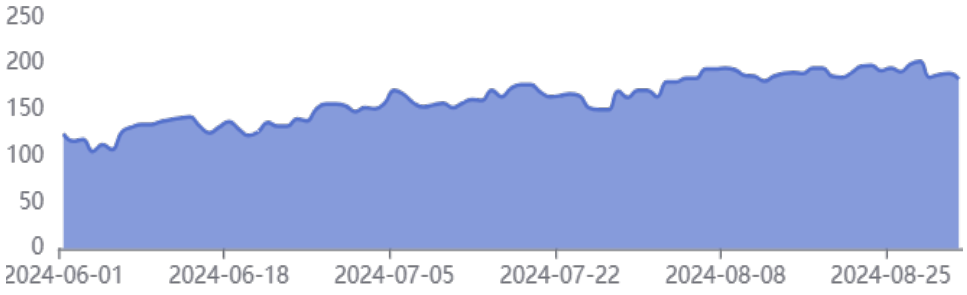


超大灵便型散货 SUPRAMAX

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.

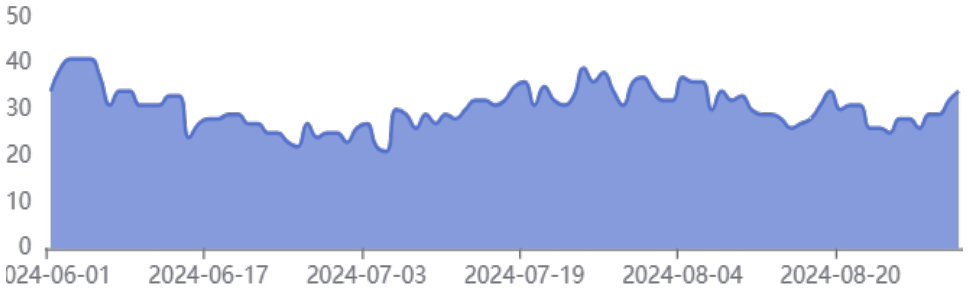
Type	M	T	W	Th	F	Sat	Sun
SMX	191	199	202	185	188	189	183



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.

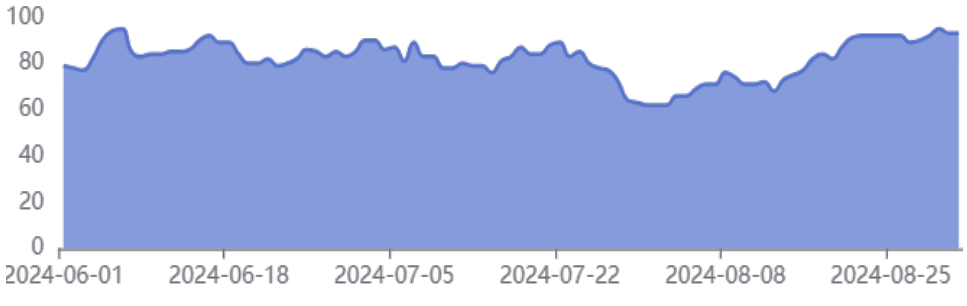
Type	M	T	W	Th	F	Sat	Sun
SMX	28	28	26	29	29	32	34



区域：美湾。最近一周超大灵便型散货船准备装货船舶数量。

Area: US Gulf. The latest week update number for Supramax with cargo loading intention.

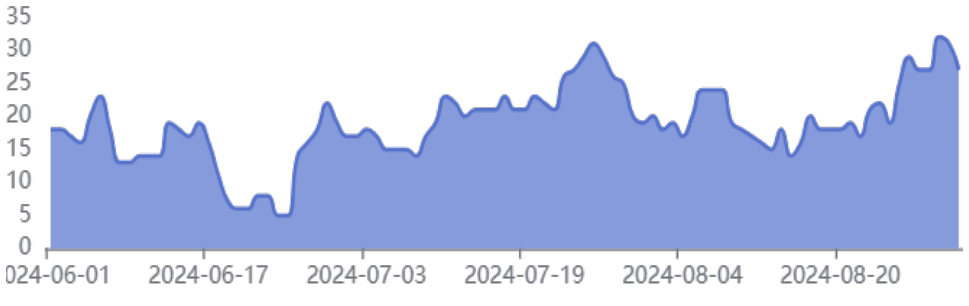
Type	M	T	W	Th	F	Sat	Sun
SMX	25	29	27	27	32	31	27



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.

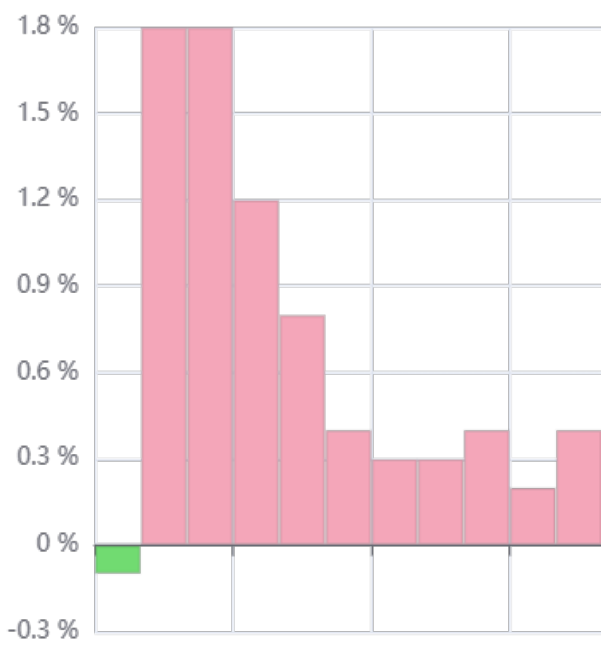
Type	M	T	W	Th	F	Sat	Sun
SMX	92	89	90	92	95	93	93

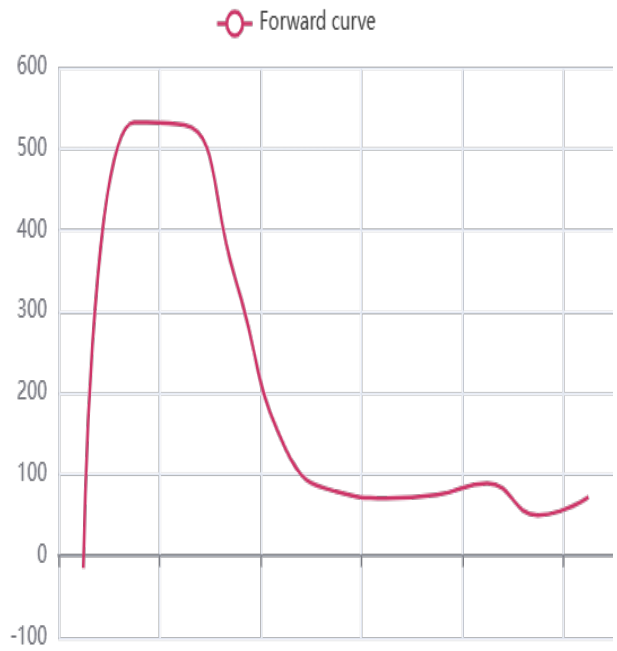


第五部分 远期运价协议 FFA

好望角型散货船Capesize

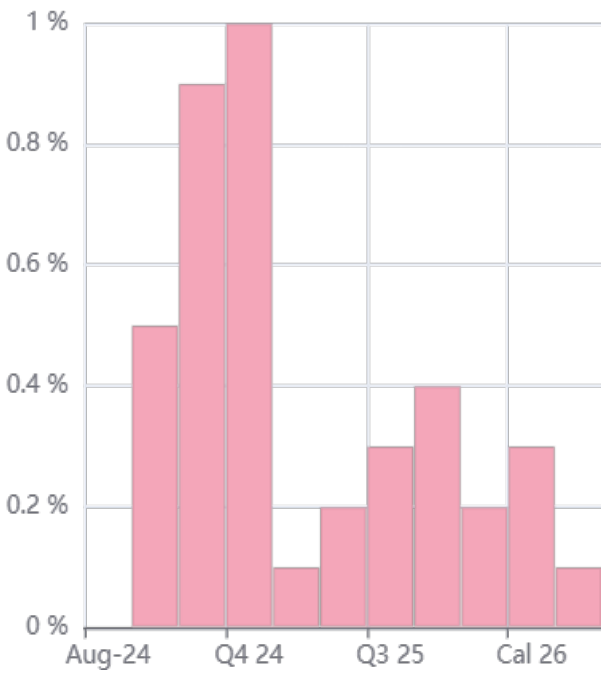
5TC	$/day	WoW	
Aug-24	21,714.00	-15.0	-0.1 %
Sep-24	29,807.00	532.0	1.8 %
Oct-24	30,629.00	529.0	1.8 %
Q4 24	28,824.00	342.0	1.2 %
Q1 25	16,296.00	132.0	0.8 %
Q2 25	20,818.00	79.0	0.4 %
Q3 25	25,371.00	71.0	0.3 %
Q4 25	25,332.00	75.0	0.3 %
Cal 25	21,954.25	89.25	0.4 %
Cal 26	21,167.75	50.0	0.2 %
Cal 27	20,268.00	72.0	0.4 %

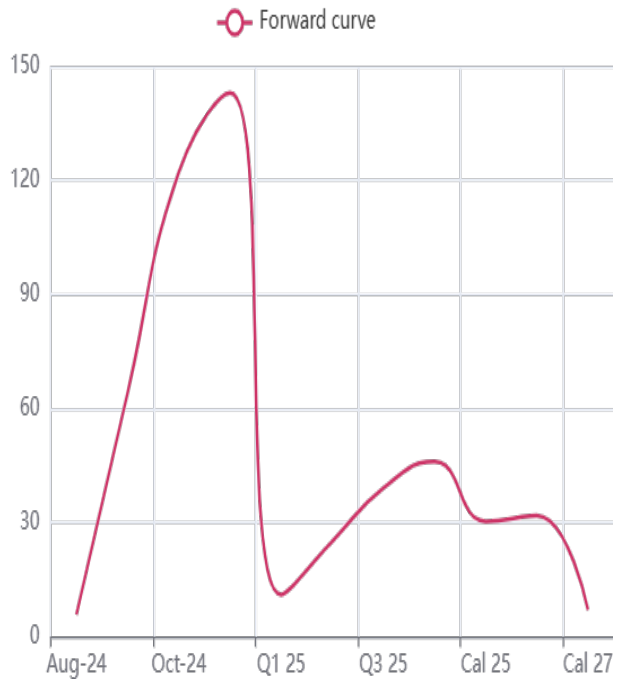




巴拿马型散货船Panamax

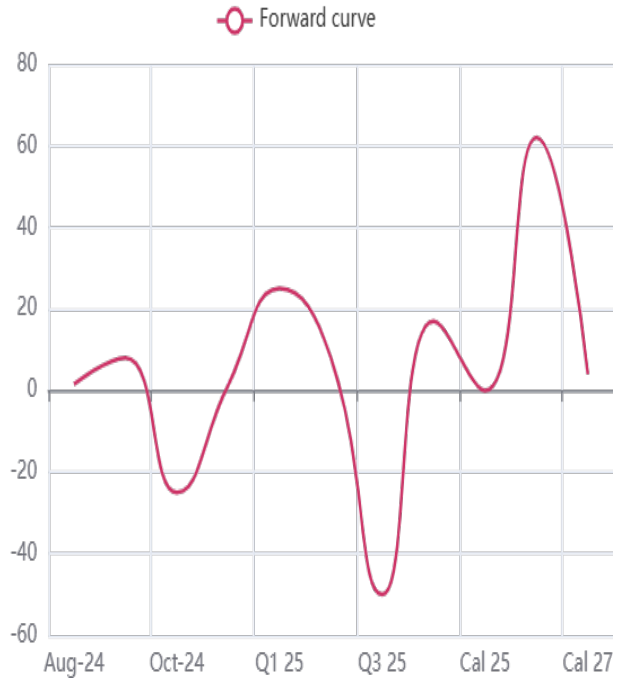
4TC	$/day	WoW	
Aug-24	12,491.80	5.8	0.0 %
Sep-24	12,614.00	64.0	0.5 %
Oct-24	14,243.00	122.0	0.9 %
Q4 24	14,346.33	143.0	1.0 %
Q1 25	11,861.00	11.0	0.1 %
Q2 25	13,446.00	25.0	0.2 %
Q3 25	13,332.00	39.0	0.3 %
Q4 25	13,071.00	46.0	0.4 %
Cal 25	12,927.50	30.25	0.2 %
Cal 26	12,561.00	31.75	0.3 %
Cal 27	12,314.00	7.0	0.1 %





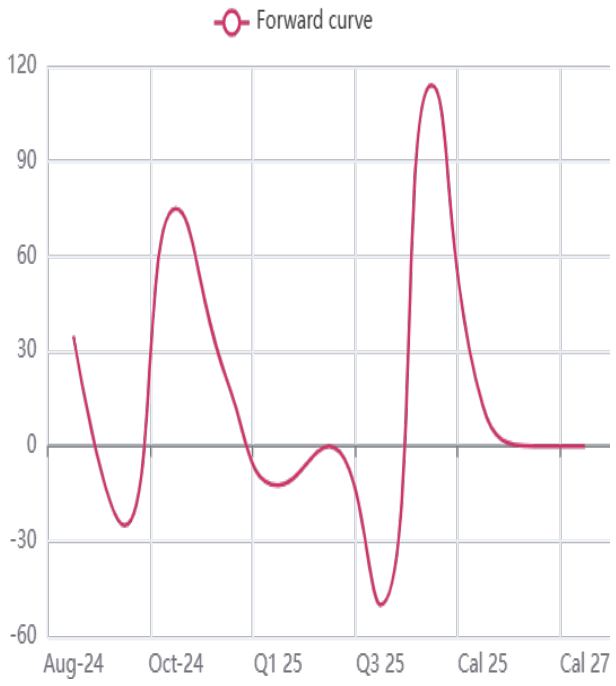
超大灵便型散货船Supramax

10TC	$/day	WoW	
Aug-24	14,430.60	1.6	0.0 %
Sep-24	14,700.00	8.0	0.1 %
Oct-24	15,029.00	-25.0	-0.2 %
Q4 24	14,822.00	1.33	0.0 %
Q1 25	11,888.00	25.0	0.2 %
Q2 25	13,483.00	8.0	0.1 %
Q3 25	13,475.00	-50.0	-0.4 %
Q4 25	12,986.00	17.0	0.1 %
12,958.00	Cal 25	0.0	0.0 %
Cal 26	12,508.00	62.0	0.5 %
Cal 27	12,279.00	4.0	0.0 %



灵便型散货船Handysize

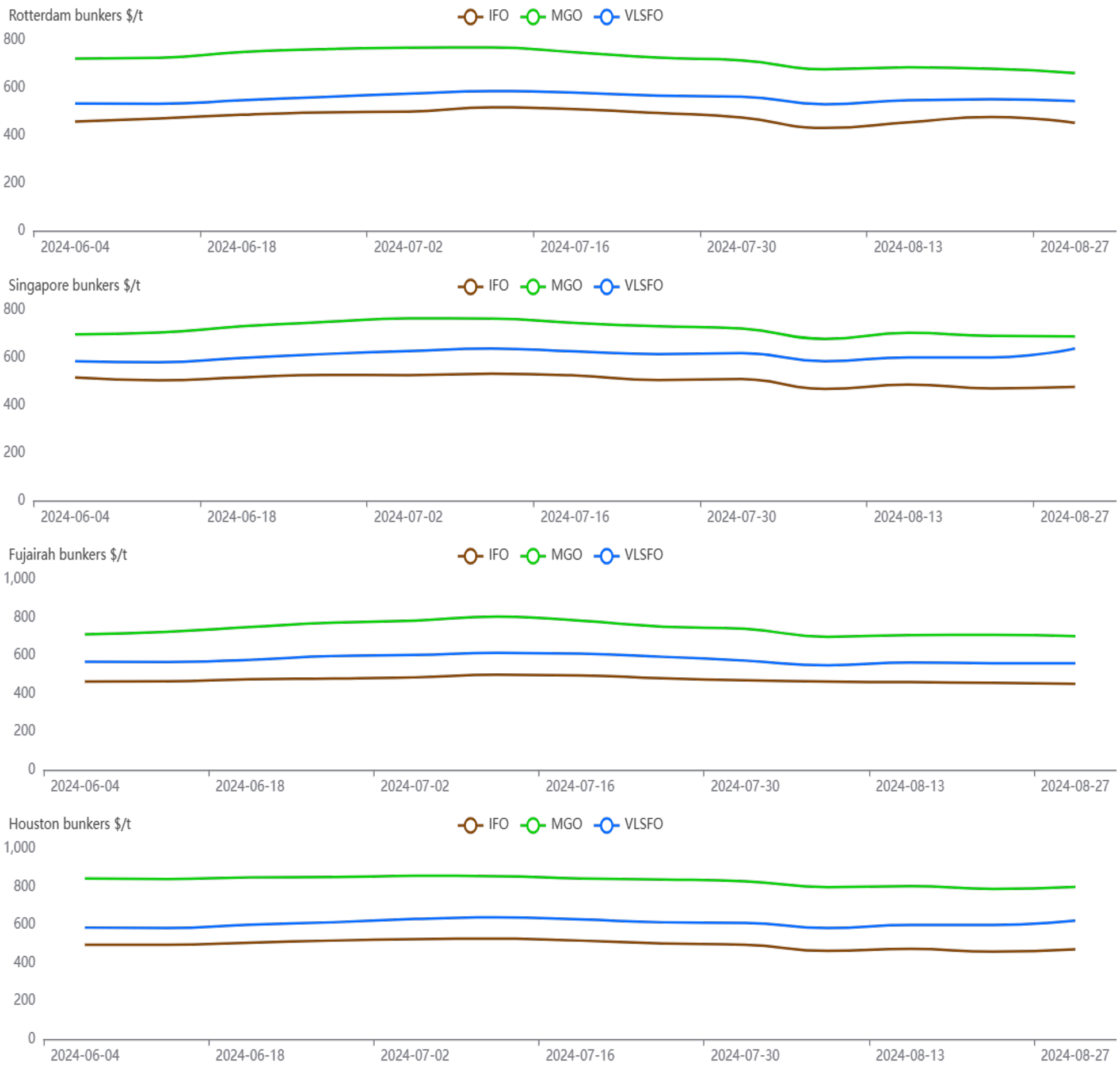
7TC	$/day	WoW	
Aug-24	13,572.80	34.8	0.3 %
Sep-24	13,563.00	-25.0	-0.2 %
Oct-24	13,881.00	75.0	0.5 %
Q4 24	13,769.00	21.0	0.2 %
Q1 25	11,038.00	-12.33	-0.1 %
Q2 25	12,575.00	0.0	0.0 %
Q3 25	12,500.00	-50.0	-50.0
Q4 25	12,439.00	114.0	0.9 %
Cal 25	12,138.00	12.92	0.1 %
Cal 26	11,675.00	0.0	0.0 %
Cal 27	11,500.00	0.0	0.0 %



第六部分 燃油价格 BUNKER PRICE

MP	LO	HO	MO	SP	WoW	W%	M%
zhoushan	620.0	488.0	736.5	132.0	21.0	18.92	41.94
Singapore	639.0	477.5	690.0	161.5	32.0	24.71	48.17
Rotterdam	545.5	453.5	662.5	92.0	17.5	23.49	5.14
Fujairah	560.0	452.5	703.0	107.5	4.5	4.37	4.37
Houston	623.0	472.5	800.5	150.5	9.5	6.74	30.87

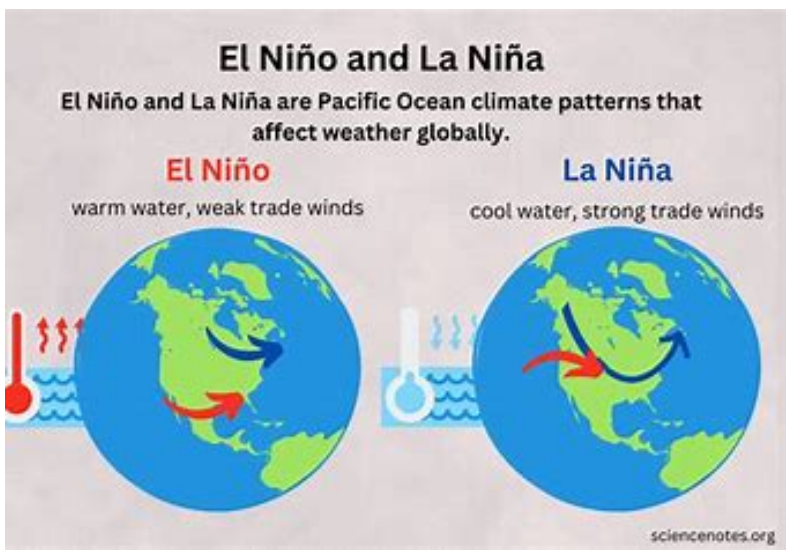
(MP-Bunkering Main Ports; LO-Heavy Low Sulphur Fuel Oil; HO-Heavy Hight Sulphur Fuel Oil; MO-MGO; SP-Spread;)



第七部分 最新商品价格 LATEST COMMODITIES PRICE

Grains and Oilseeds	Index	+/-	Weekly	Monthly	YTD
Wheat	195.0	-3.0	-1.52	-1.52	-17.66
Maize	200.0	1.0	0.5	-0.99	-12.48
Soybeans	198.0	2.0	1.02	-7.04	-26.92
Rice	246.0	1.0	0.41	-0.4	0.75
Barley	204.0	-1.0	-0.49	-4.23	-10.55
Energy	Index	+/-	Weekly	Monthly	YTD
Crude Oil	USD/Bbl	75.77	-0.2	-0.26	-2.03	-7.1
Brent	USD/Bbl	79.98	0.9	1.14	-1.61	-6.08
Natural Gas	USD/MMBtu	2.01	-0.11	-5.19	-2.9	-23.28
Gasoline	USD/Gal	2.29	-0.01	-0.43	-7.29	-19.37
Heating Oil	USD/Gal	2.33	0.02	0.87	-4.12	-26.73
Ethanol	USD/Gal	1.83	0.02	1.1	3.39	-14.08
Naphtha	USD/T	658.97	0.98	0.15	-4.33	3.23
Propane	USD/Gal	0.77	0.01	1.32	-2.53	14.93
Uranium	USD/Lbs	82.4	1.2	1.48	-0.06	44.56
Methanol	CNY/T	2444.0	42.0	1.75	-2.24	0.87
TTF Gas	EUR/MWh	36.7	-3.1	-7.79	9.85	-4.87
UK Gas	GBp/thm	88.0	-8.85	-9.14	12.52	-9.42
Industrial		Index	+/-	Weekly	Monthly	YTD
Copper	USD/Lbs	4.22	0.06	1.44	3.43	14.67
Coal	USD/T	145.2	-1.55	-1.06	4.27	-2.88
Steel	CNY/T	3053.0	-1.0	-0.03	-0.07	-16.7
Iron Ore	USD/T	98.05	0.24	0.25	-8.24	-9.63
Aluminum	USD/T	2542.0	138.0	5.74	12.11	18.92
Lithium	CNY/T	74000.0	500.0	0.68	-13.45	N/A
Metals		Index	+/-	Weekly	Monthly	YTD
Gold	USD/t.oz	2524.0	21.6	0.86	5.54	33.65
Silver	USD/t.oz	30.1	1.1	3.79	7.5	32.19
Platium	USD/t.oz	967.0	18.0	1.9	2.55	6.47
Currencies	Index	+/-	Weekly	Monthly	YTD
EUR/USD	1.12	0.02	1.82	3.7	2.75
USD/CNY	7.12	-0.02	-0.28	-2.06	-2.73

第八部分 本周话题 WEEKLY TOPIC



厄尔尼诺/拉尼娜与全球海运

厄尔尼诺和拉尼娜气候周期对区域降水量和气温有着明显的影响，对西北太平洋热带气旋的生成频率也有紧密的联系，对全球干散货贸易和海运的影响常常引发市场讨论。厄尔尼诺和拉尼娜气候现象是交替出现的，随着厄尔尼诺的结束，有预测显示今年第四季度将迎来较强烈的拉尼娜事件，航运界可以关注未来一年拉尼娜对航运会产生哪些典型的潜在影响。

厄尔尼诺南徊（ENSO）是一个在太平洋发展变化的气候周期，交替出现"温暖干燥"的厄尔尼诺阶段和"寒冷潮湿"的拉尼娜阶段，改变着全球的温度和降雨。近年来，极端的厄尔尼诺和拉尼娜变得更加常见，处于过渡温和阶段的年份在显著变短，这也许又与温室气体的增加有关联。由于2023年厄尔尼诺现象的干旱，导致阿根廷和美国大部分时间的粮食产量下降或者密西西比河水位下降，致使粮食装载量同比分别下降45%和25%。去年的剧烈的厄尔尼诺也导致巴拿马运河的干旱进而影响了船舶的通行数量。

拉尼娜可能对太平洋及更远地区的气象产生复杂多样的影响，首先拉尼娜会使得西太平洋的热带气旋增多，在东南亚和东澳大利亚，拉尼娜通常伴随着更潮湿的天气。上一个拉尼娜阶段给澳大利亚和印度尼西亚带来了严重洪水，这直接干扰了煤矿开采、铁路运输和船舶装载。然而，湿润天气有可能助力粮食丰收和出口。

在太平洋另一边，拉尼娜通常也给巴西部分地区带来更潮湿的天气，其影响情况相对复杂。在上一个拉尼娜阶段，强降雨干扰了铁矿石的生产和运输，导致2022年第一季度出口同比下降11.3%，并使某些地区的粮食因洪水而绝收。

拉尼娜还在特定时期和地区影响着对干散货的需求变化，特别是煤炭。特别是中国北方、日本和韩国的拉尼娜冬天可能会变得更加寒冷和干燥，这可能导致水库水位下降从而减少了水电发电量，而采暖需求因为寒冷而增加，解决问题还是依赖于进口煤碳。这可能会推动煤炭的吨海里需求。

拉尼娜在过去对地区和干散货需求产生了很大的影响，但并不是单一原因造成，该影响其实来自多种复杂因数，与地缘政治、大宗商品价格和贸易流动变化等其它动态因素也息息相关。

The El Niño and La Niña climate cycles have a significant impact on regional precipitation and temperature, closely linked to the frequency of tropical cyclones in the northwest Pacific as well. Their effects on global dry bulk trade and shipping often spark market discussions. El Niño and La Niña phenomena alternate, and with the conclusion of this year's El Niño, predictions suggest a strong La Niña event in the fourth quarter, prompting the shipping industry to consider the potential typical impacts of La Niña on shipping over the next year.

The El Niño-Southern Oscillation (ENSO) is a climate cycle occurring in the Pacific, characterised by alternating "warm and dry" El Niño phases and "cold and wet" La Niña phases, which alter global temperatures and rainfall. In recent years, extreme El Niño and La Niña events have become more common, with the duration of transitional moderate years significantly shortening, possibly linked to the increase in greenhouse gases. The drought caused by the 2023 El Niño has led to decreased agricultural yields in Argentina and much of the United States, as well as lower water levels in the Mississippi River, resulting in a year-on-year reduction in food loading volumes of 45% and 25%, respectively. Last year's severe El Niño also caused drought in the Panama Canal, affecting the number of vessels passing through.

La Niña can produce a wide array of complex impacts on weather across the Pacific and beyond. Firstly, La Niña tends to increase the number of tropical cyclones in the western Pacific, and in Southeast Asia and eastern Australia, it is typically associated with wetter weather. The previous La Niña phase brought severe flooding to Australia and Indonesia, directly disrupting coal mining, rail transport, and vessel loading. However, the wetter conditions can also aid in bountiful harvests and exports.

On the other side of the Pacific, La Niña usually brings wetter weather to certain regions of Brazil, although the effects can be complex. During the last La Niña episode, heavy rainfall disrupted iron ore production and transport, resulting in an 11.3% year-on-year decline in exports in the first quarter of 2022, and some regions faced crop failures due to flooding.

La Niña also affects demand for dry bulk commodities, particularly coal, at specific times and in certain areas. Notably, winters during La Niña in Northern China, Japan, and South Korea may become colder and drier, potentially leading to reduced reservoir levels and diminished hydropower generation, while heating demand increases due to the cold. This situation may lead to a reliance on imported coal, likely driving up the demand for coal measured in ton- mile.

Historically, La Niña has significantly influenced regional markets and demand for dry bulk goods, although this influence arises from a myriad of complex factors rather than a single cause, and is closely related to other dynamic elements, including geopolitics, commodity prices, and shifts in trade flows.