



2024年 第2周市场周报

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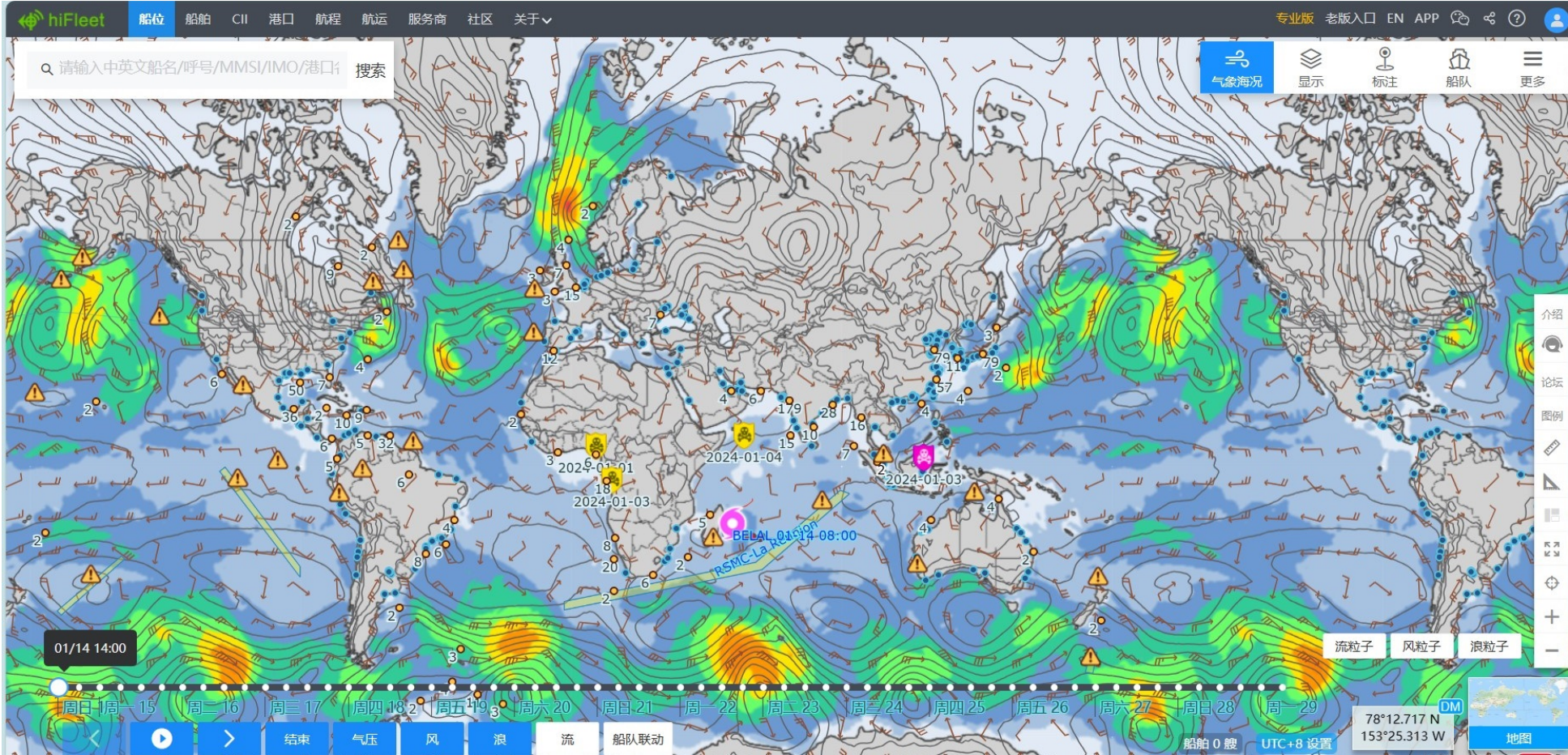
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本周话题 WEEKLY TOPIC

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904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 904 navigational warnings in effect around the ocean on hiFleet with the Far East and around the coastal of Caribbean Sea still being the majority. Please pay attention to the navigational warnings in relevant waters.

航海气象 Meteorology

未来一周受冷空气影响，中国渤海、黄海、东海海域风力由4-5级逐步增强到6-7级，相关海域海浪将从2米的中浪到3米大浪；台湾海峡风力由4-5级增强到6-7级，台湾海峡洋面海浪将经历3米大浪，南海大部海域风力维持在4-5级，有2米中浪。辽东湾最大浮冰范围20-30海里；渤海湾、莱州湾最大浮冰范围5海里左右；黄海北部最大浮冰范围5-10海里。大西洋和太平洋北部区域低压活动频繁，海域海况恶劣。The coming week affected by the cold air the wind in Bohai Sea, Yellow Sea and China East Sea will gradually strengthen from moderate to strong breeze with the seas from moderate to rough. The wind in the Taiwan Strait will experience from moderate to strong breeze. The sea in the Taiwan Strait happens to experience rough. In most of the South China Sea the wind are moderate with moderate sea. Low-pressure in the north of North Atlantic Ocean and Pacific is still frequent, rough sea conditions.

海盗事件 Piracy

在1月4日傍晚，距离索马里Eyl东南约455海里处，一艘散货船在航行中，船员在雷达上发现了索马里海盗的母船，7名海盗手持机关枪和火箭筒向该船开火。在海盗登船前所有船员都进入了船舶安全堡垒。附近的印度军舰对该事件随即做出反应，海军登船并对海盗进行了扫荡。船员获得安全确认后，从船舶安全堡垒中出来，又重新控制了该船，所有船员都安全。On the evening of 4 January, some 455 nautical miles southeast of Eyl, Somalia, a bulk carrier was sailing when its crew spotted the Somali pirates' mother ship on radar and seven pirates armed with machine guns and rocket-propelled grenades opened fire on the vessel. All the crew entered the ship's safety fort before the pirates boarded the ship. A nearby Indian warship responded to the incident by boarding the ship and conducting a sweep against the pirates. After the crew received safety confirmation, they emerged from the ship's safety fort and regained control of the ship, and all crew members were safe.

海上事件 Marine Incidents

据hiFleet数据显示，北京时间1月11日中午，一艘希腊船东的SUEZMAX油轮（15万载重吨，2011年韩国造）在阿曼海被一群蒙面武装所劫持。劫持事件发生应该十分突然，该船几乎没有停留并在北京时间12点39分采取大幅度转向，驶向伊朗贾斯克方向。该船原目的港是土耳其阿利阿，预计抵达阿利阿时间是1月23号。According to hiFleet data, at noon on January 11, Beijing time, a Greek ship owner's SUEZMAX tanker (150,000 DWT, 2011 South Korea-built) was hijacked by a masked gang in the Sea of Oman. The hijacking appears to have been quite sudden, with the ship barely stopping and making a sharp turn in the direction of Jask, Iran, at 12:39. The ship's original destination port is Aliah, Turkey, and it is expected to arrive in Aliah on January 23.

其它 Others

无。Nil.

备注 Remark

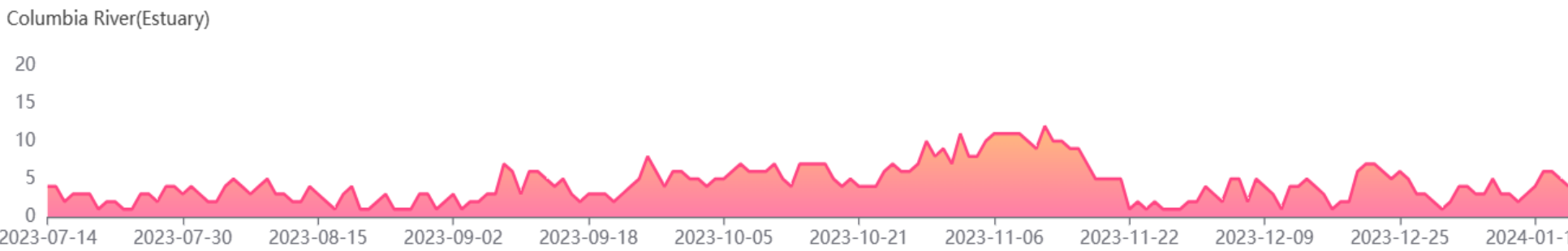
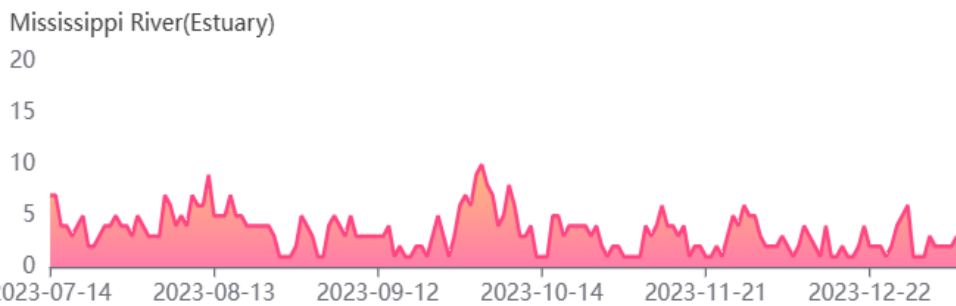
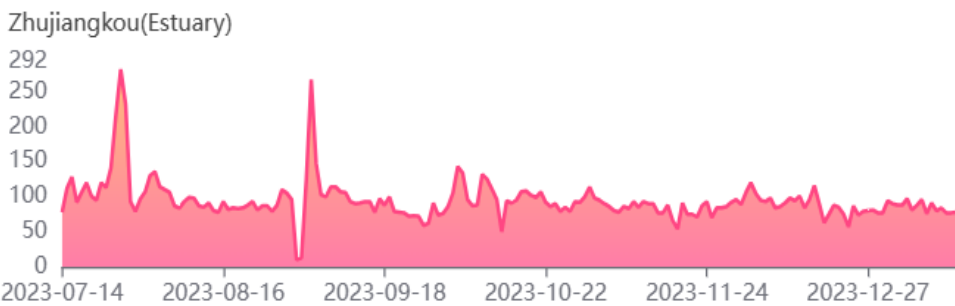
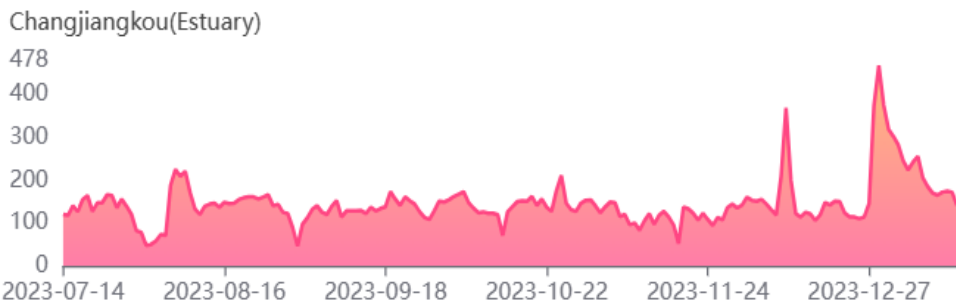
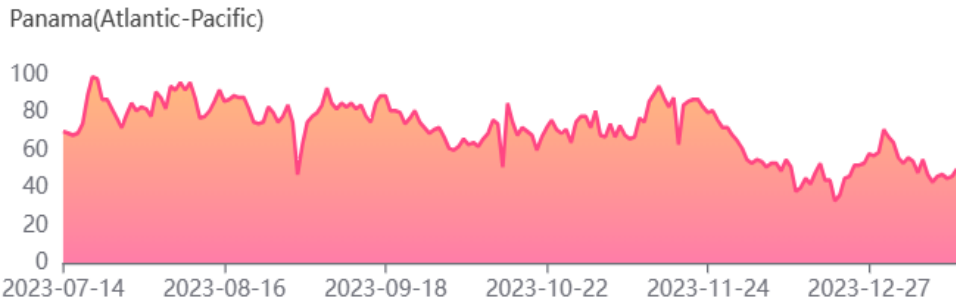
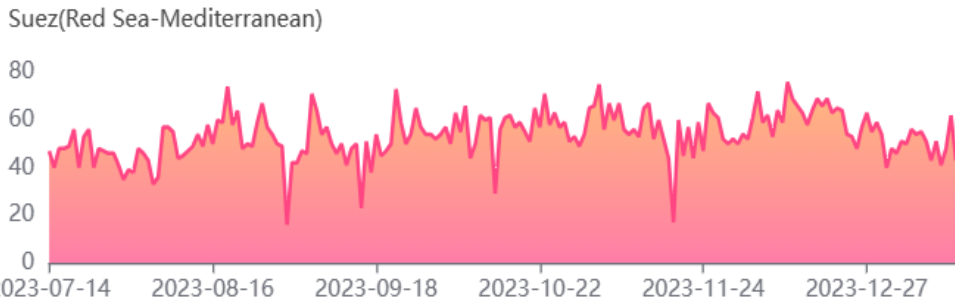
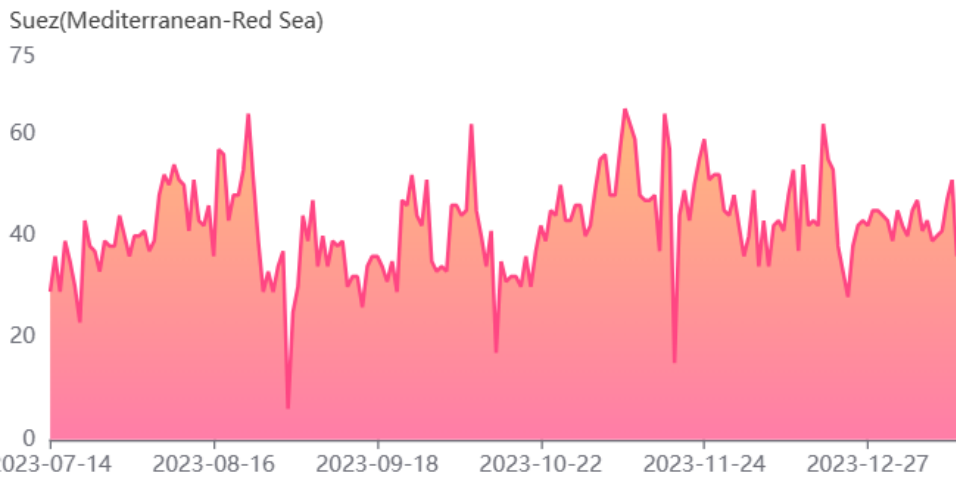
本报告数据截止时间为2024年1月14日北京时间17点；所有数据和或观点仅供参考，在任何情况下本公司及其员工不承担任何风险。The data deadline for this report is Beijing time 17 hours on January 14 of 2024; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

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	1578	-6	-130
Miss.Riv.	3	51	-6	-21
CJK	141	5902	-691	1801
Pa.Atlan.	50	1480	-74	-317
Colum.Riv.	4	113	6	30
Suez.Med.	36	1249	-4	-66
Pa.Pac.	57	1711	-10	-506
ZJK	78	2373	-63	-277

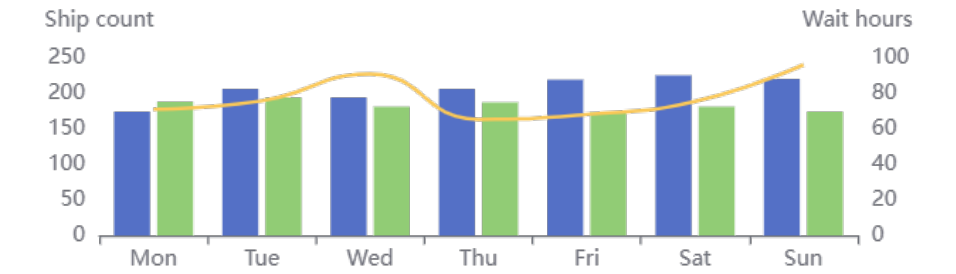
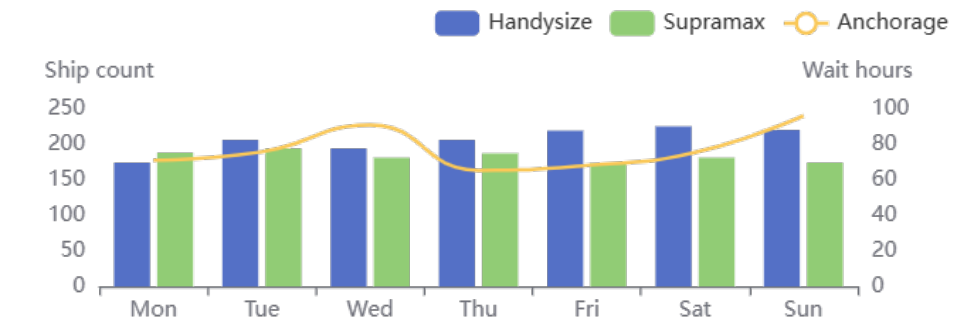


(P.N-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

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

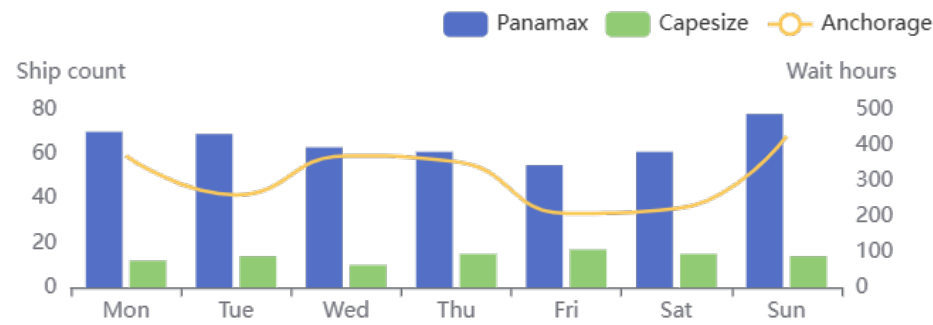
Type	M	T	W	Th	F	Sat	Sun
HDY	174	206	194	206	219	225	220
SMX	188	194	181	187	173	181	174
WT.h.	71	75.7	90.8	65.3	68.1	75.4	96



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

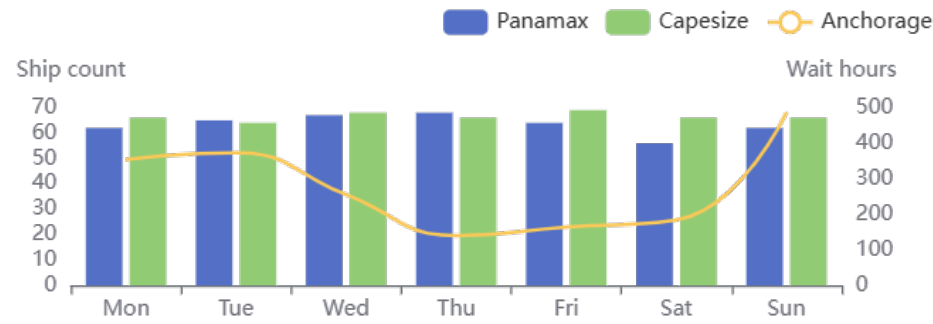
Type	M	T	W	Th	F	Sat	Sun
Pan.	70	69	63	61	55	61	78
Cap	12	14	10	15	17	15	14
WT.h.	369.6	260.5	370.3	353.5	208.2	221.6	425



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

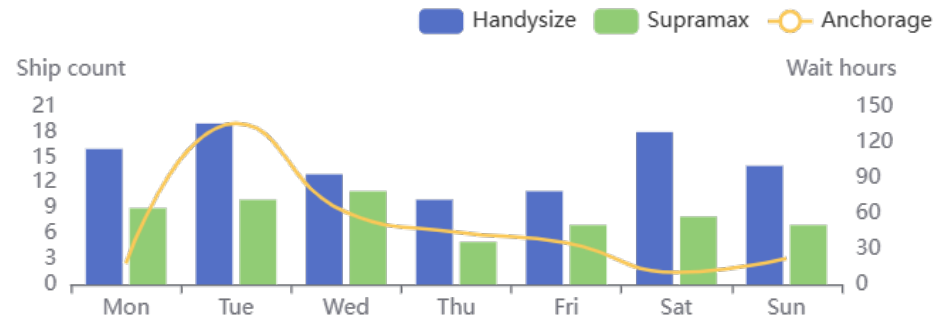
Type	M	T	W	Th	F	Sat	Sun
Pan.	62	65	67	68	64	56	62
Cap	66	64	68	66	69	66	66
WT.h.	353.8	373.3	255.6	140	164	184.3	487



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

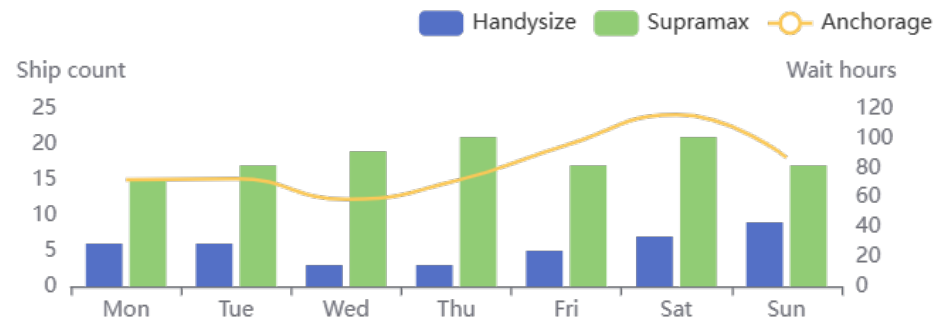
Type	M	T	W	Th	F	Sat	Sun
HDY	16	19	13	10	11	18	14
SMX	9	10	11	5	7	8	7
WT.h.	17.7	135.8	60.9	44.1	35.2	10.2	22



最近一周美湾区域超大灵便型散货船和灵便型散货船舶锚泊数量和平均锚泊时长

Latest Week Update for Supra and Handy Num. and Waiting Time Information in Anchorages of US Gulf

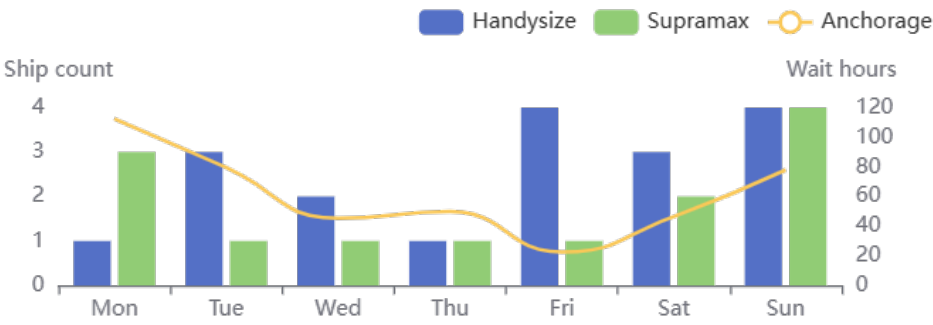
Type	M	T	W	Th	F	Sat	Sun
HDY	6	6	3	3	5	7	9
SMX	15	17	19	21	17	21	17
WT.h.	72	72.7	58.75	71.4	95.4	116.0	87



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

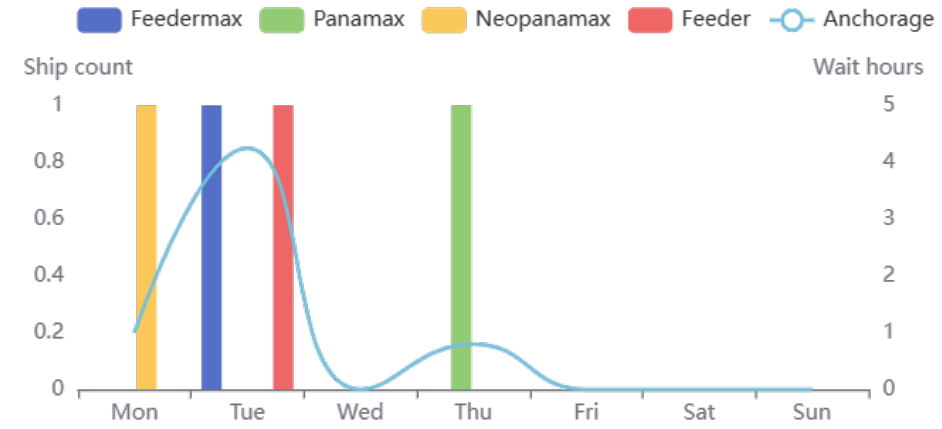
Type	M	T	W	Th	F	Sat	Sun
HDY	1	3	2	1	4	3	4
SMX	3	1	1	1	1	2	4
WT.h.	112.4	79.55	45.3	49.9	22.5	46.5	78



最近一周香港区域集装箱船锚泊数量和平均等待时长

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

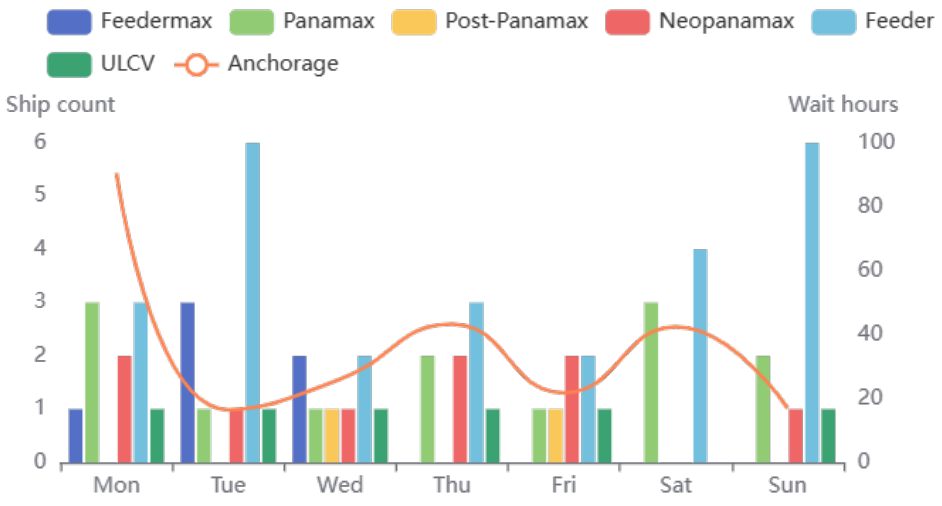
Type	M	T	W	Th	F	Sat	Sun
F.ma.	0	1	0	0	0	0	0
Pan.	0	0	0	1	0	0	0
PPx	0	0	0	0	0	0	0
NPx	1	0	0	0	0	0	0
Fd	0	1	0	0	0	0	0
WT.h.	1	4.25	0.0	0.8	0.0	0.0	0.0
Ulc v	0	0	0	0	0	0	0



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

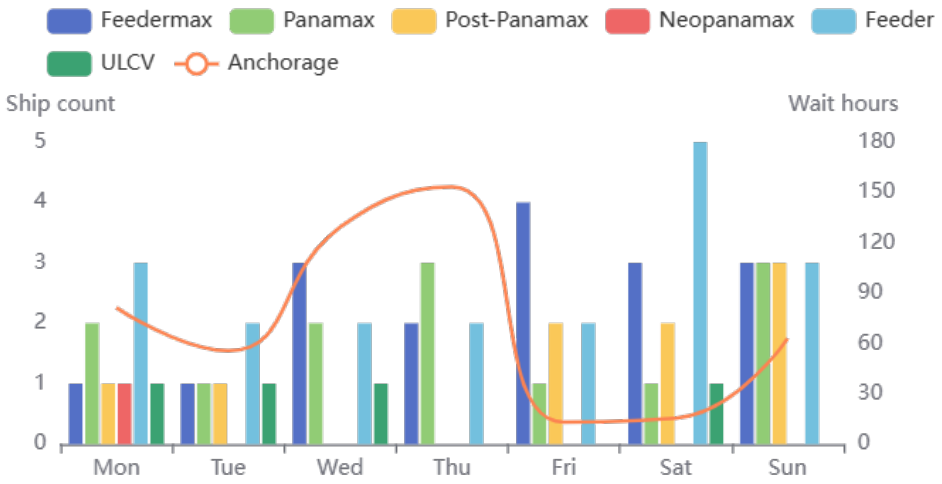
Type	M	T	W	Th	F	Sat	Sun
F.ma.	1	3	2	0	0	0	0
Pan.	3	1	1	2	1	3	2
PPx	0	0	1	0	1	0	0
NPx	2	1	1	2	2	0	1
Fd	3	6	2	3	2	4	6
Ulc v	1	1	1	1	1	0	1
WT.h.	90.5	16.5	26.05	43.3	21.8	42.5	17



最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

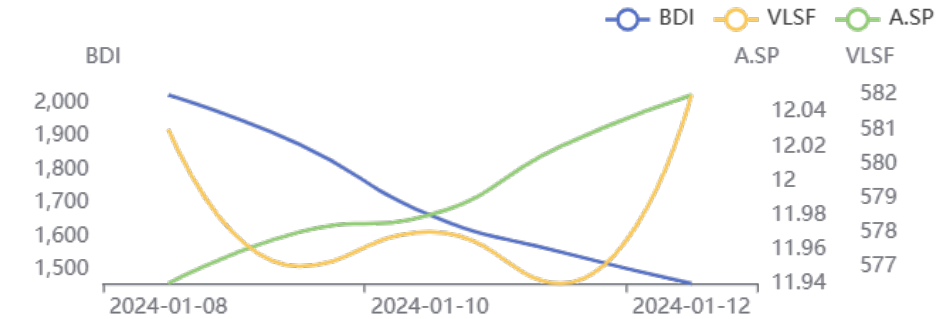
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

Type	M	T	W	Th	F	Sat	Sun
F.ma.	1	1	3	2	4	3	3
Pan.	2	1	2	3	1	1	3
PPx	1	1	0	0	2	2	3
NPx	1	0	0	0	0	0	0
Fd	3	2	2	2	2	5	3
Ulc v	1	1	1	0	0	1	0
WT.h.	81.3	55.65	129.3	153.3	13.1	15.5	63



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

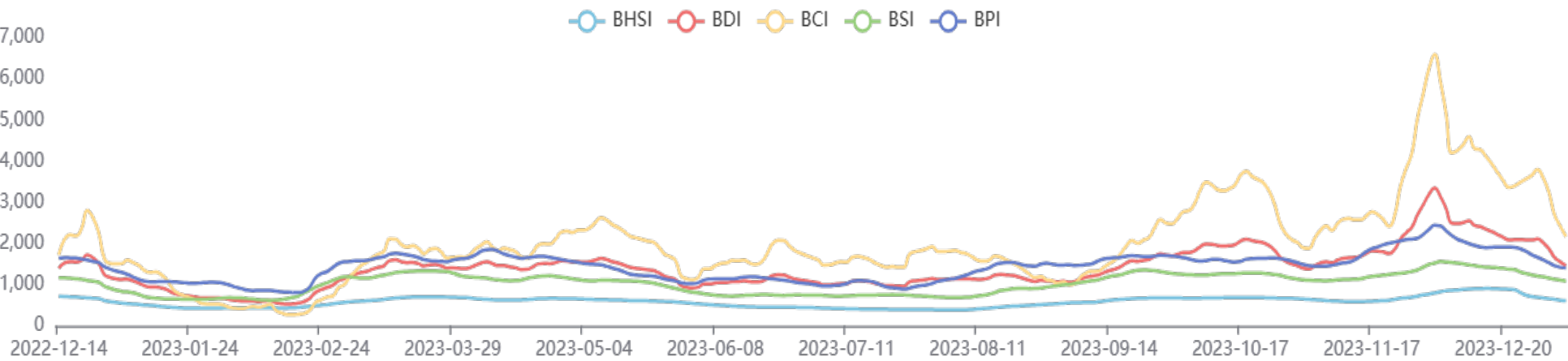
Type	M	T	W	Th	F	Sat	Sun
BDI	1605	1534	1464	1421	1410		
VLSF	581	577	578	576.5	582		
A.SP	11.94	11.97	11.98	12.02	12.05	11.99	



第三部分 航运市场 SHIPPING MARKET

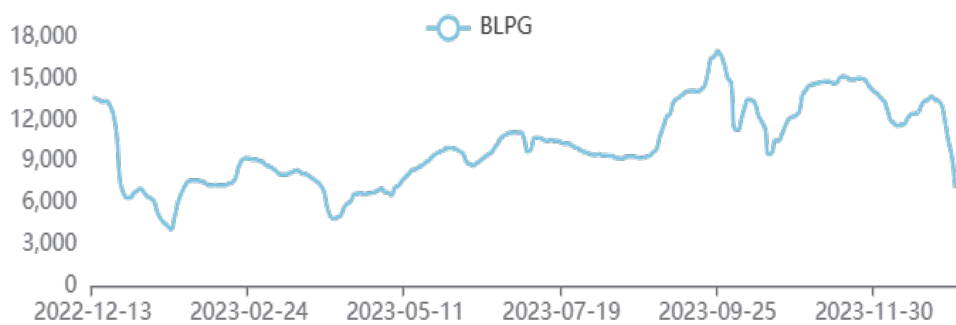
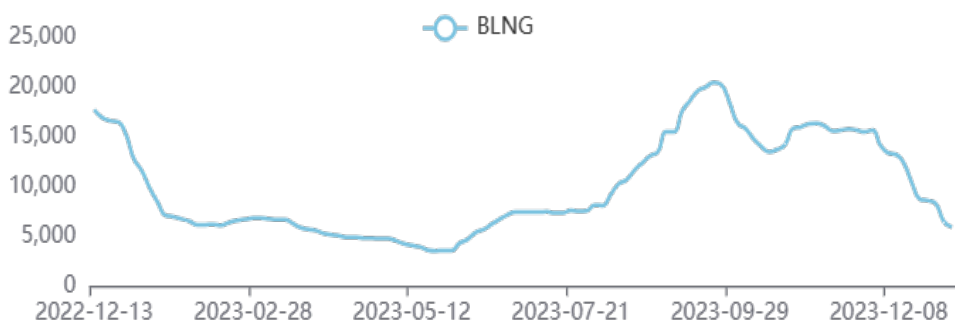
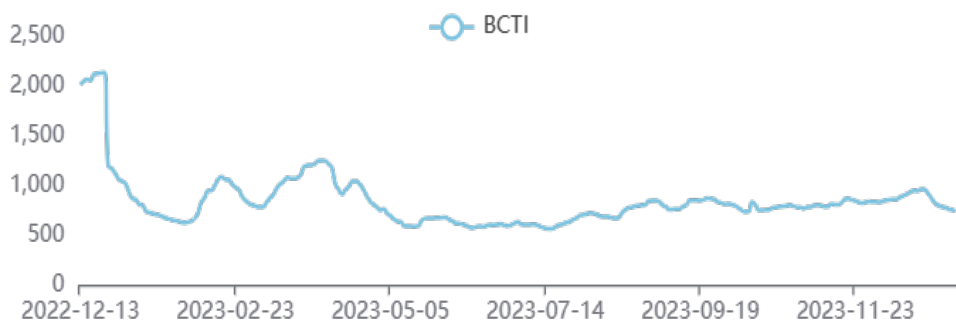
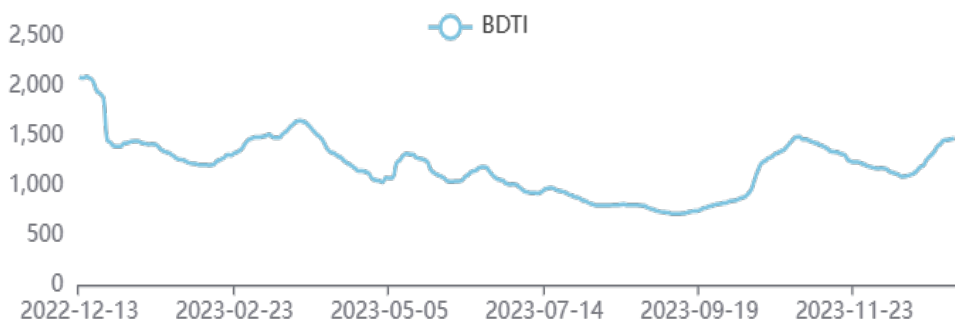
波罗的海干散货指数Baltic Dry Index

Type	PI	WoW	W%	M%	y%
BDI	1460	-650.0	-30.81	-37.82	49.59
BCI	2172	-1626.0	-42.81	-47.19	61.01
BPI	1410	-256.0	-15.37	-25.79	30.07
BSI	1088	-124.0	-10.23	-23.7	52.17
BHSI	616	-79.0	-11.37	-32.16	21.26



能源运价指数Energy Shipping Index

Type	PI	WoW	W%	M%	y%
BDTI	1473	89.0	6.43	33.54	2.22
BCTI	741	-58.0	-7.26	-20.58	-14.83
BLNG	5908	-2299.0	-28.01	-51.65	-39.87
BLPG	7103	-6290.0	-46.96	-42.79	4.7



第四部分 运力分布 SUPPLY DISTRIBUTION

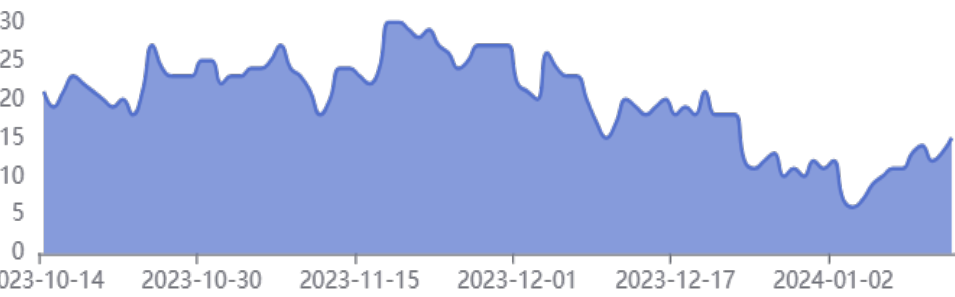


好望角型散货船 Capesize

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	11	11	13	14	12	13	15



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.

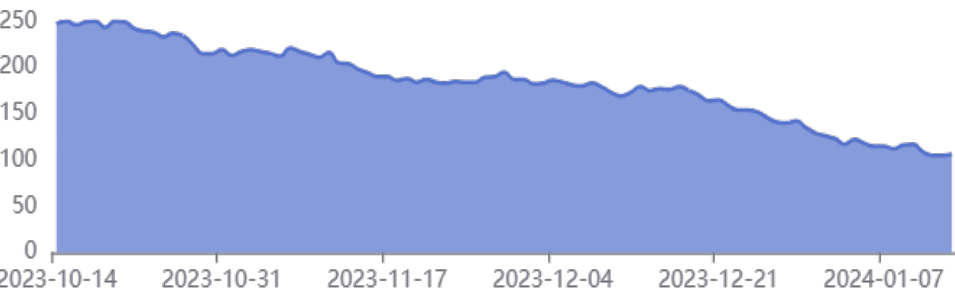
Type	M	T	W	Th	F	Sat	Sun
Cape	17	23	24	20	22	17	17

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.

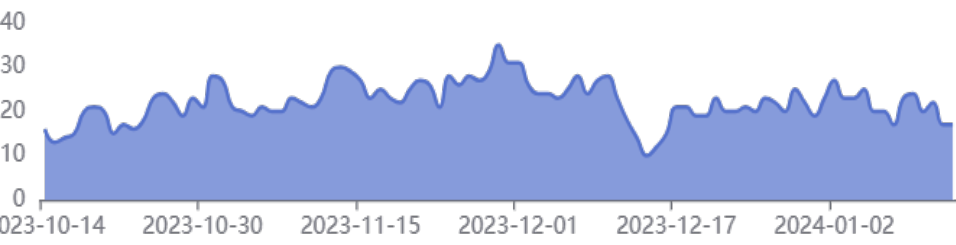
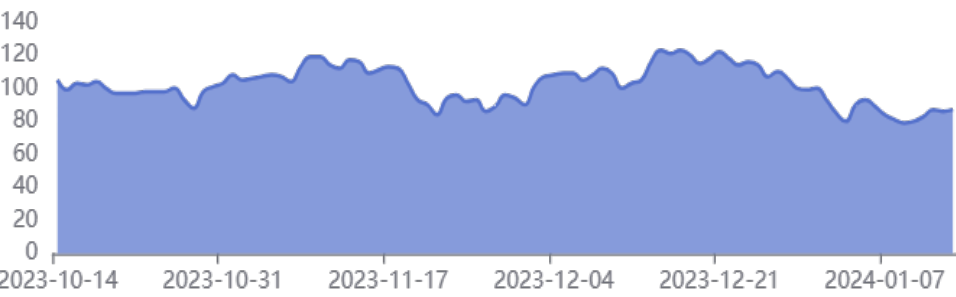
Type	M	T	W	Th	F	Sat	Sun
Pan.	112	116	117	109	105	105	106



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.

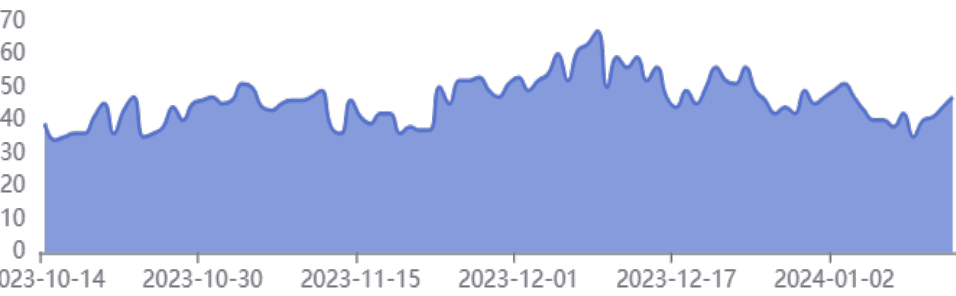
Type	M	T	W	Th	F	Sat	Sun
Cape	81	79	80	83	87	86	87



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.

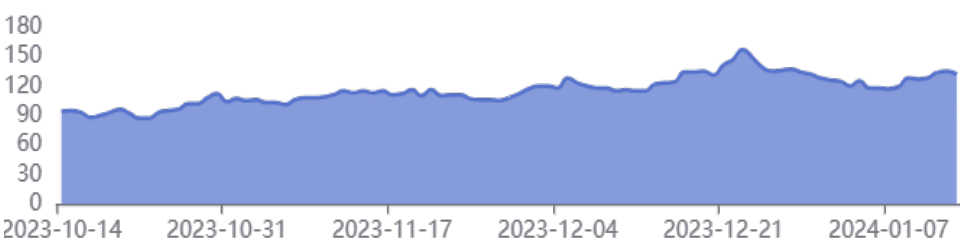
Type	M	T	W	Th	F	Sat	Sun
Pan.	35	39	37	37	35	37	39



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.	119	128	127	128	134	135	132

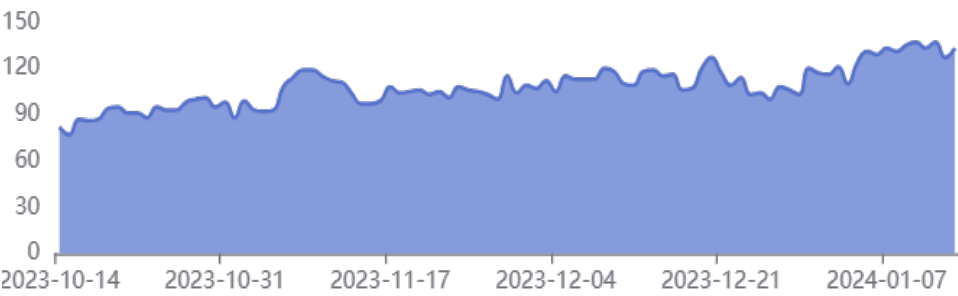


超大灵便型散货 SUPRAMAX

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.

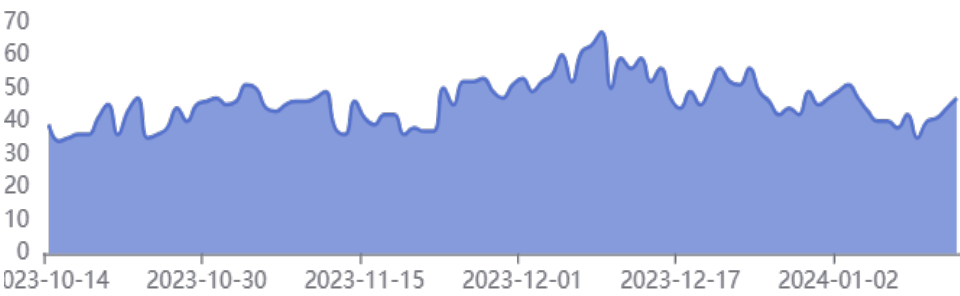
Type	M	T	W	Th	F	Sat	Sun
SMX	131	135	137	133	137	127	133



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.

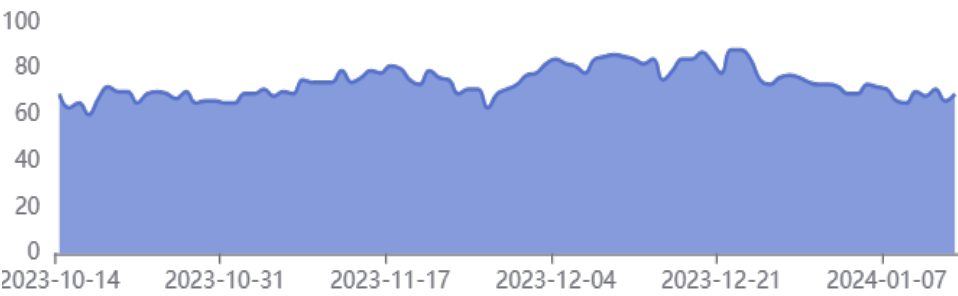
Type	M	T	W	Th	F	Sat	Sun
SMX	38	42	35	40	41	44	47



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.

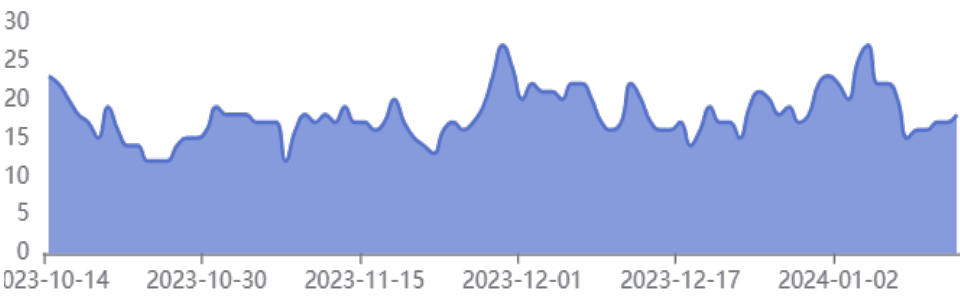
Type	M	T	W	Th	F	Sat	Sun
SMX	20	15	16	16	17	17	18



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.

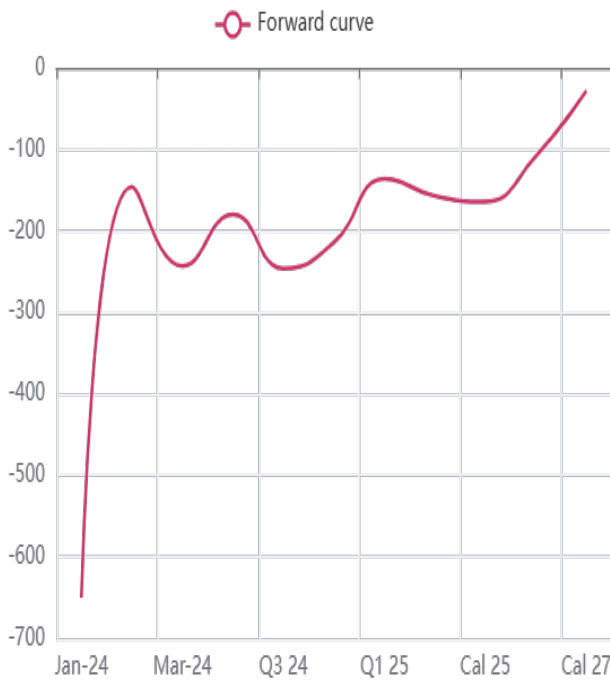
Type	M	T	W	Th	F	Sat	Sun
SMX	66	65	70	68	71	66	69



第五部分 远期运价协议 FFA

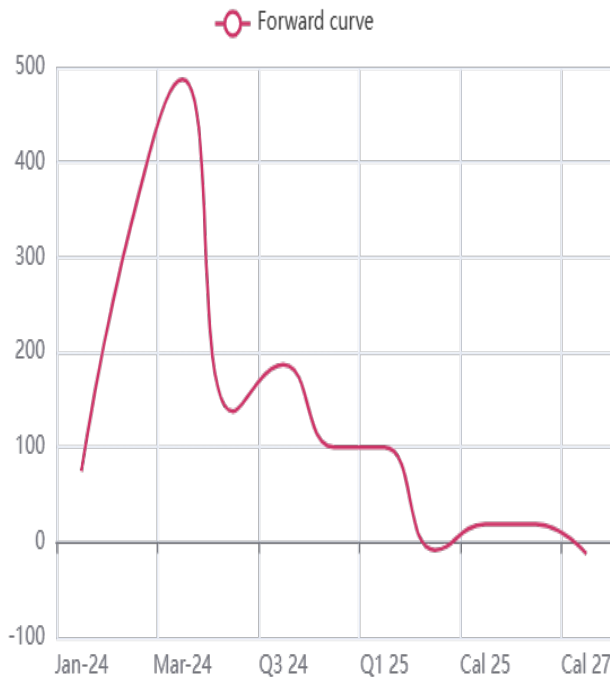
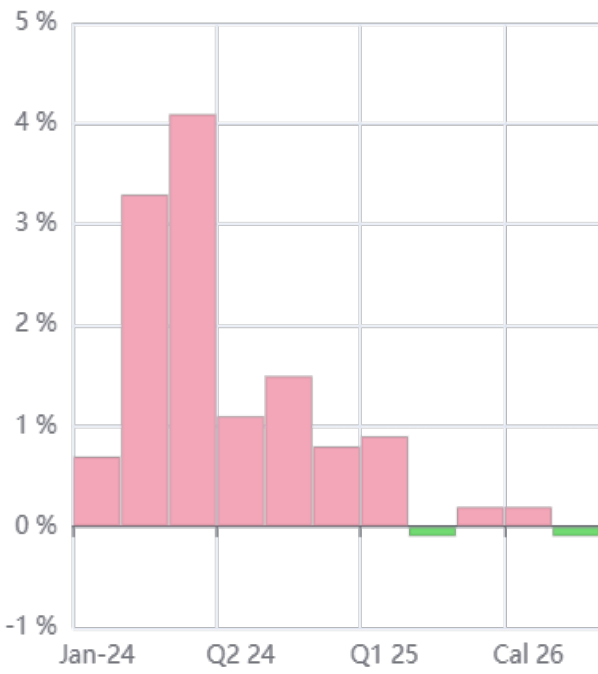
好望角型散货船Capesize

5TC	\$/day	WoW	
Jan-24	19,021.00	-650.0	-3.3 %
Feb-24	11,504.00	-146.0	-1.3 %
Mar-24	13,636.00	-243.0	-1.8 %
Q2 24	17,182.00	-179.67	-1.0 %
Q3 24	20,025.00	-246.0	-1.2 %
Q4 24	20,493.00	-214.0	-1.0 %
Q1 25	12,700.00	-136.0	-1.1 %
Q2 25	16,336.00	-157.0	-1.0 %
Cal 25	17,036.00	-164.0	-1.0 %
Cal 26	17,071.00	-108.0	-0.6 %
Cal 27	17,186.00	-28.0	-0.2 %



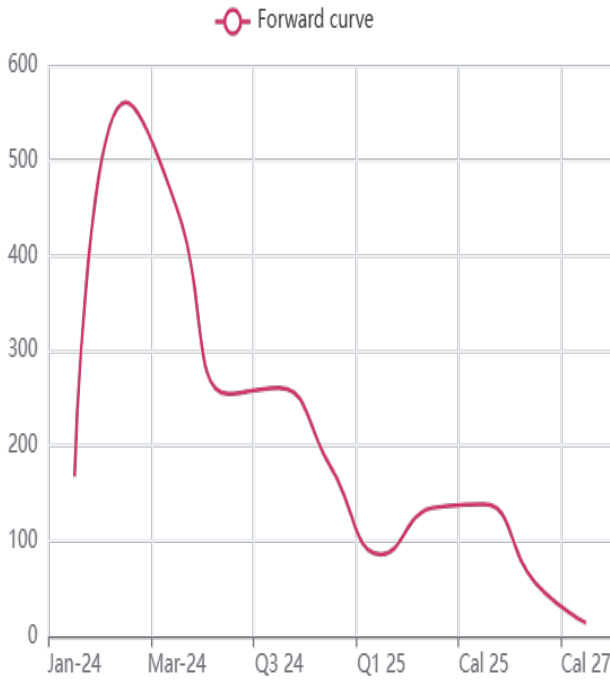
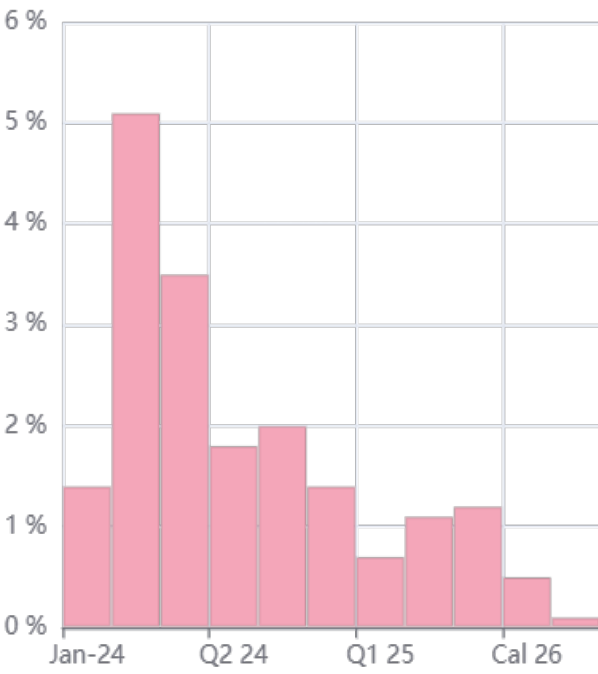
灵便型散货船Handysize

7TC	\$/day	WoW	
Jan-24	11,475.00	75.0	0.7 %
Feb-24	10,538.00	338.0	3.3 %
Mar-24	12,300.00	487.0	4.1 %
Q2 24	12,621.33	137.67	1.1 %
Q3 24	12,400.00	187.0	1.5 %
Q4 24	12,050.00	100.0	0.8 %
Q1 25	11,100.00	100.0	100.0
Q2 25	11,784.00	-8.0	-0.1 %
Cal 25	11,613.00	19.0	0.2 %
Cal 26	11,525.00	19.0	0.2 %
Cal 27	11,463.00	-12.0	-0.1 %



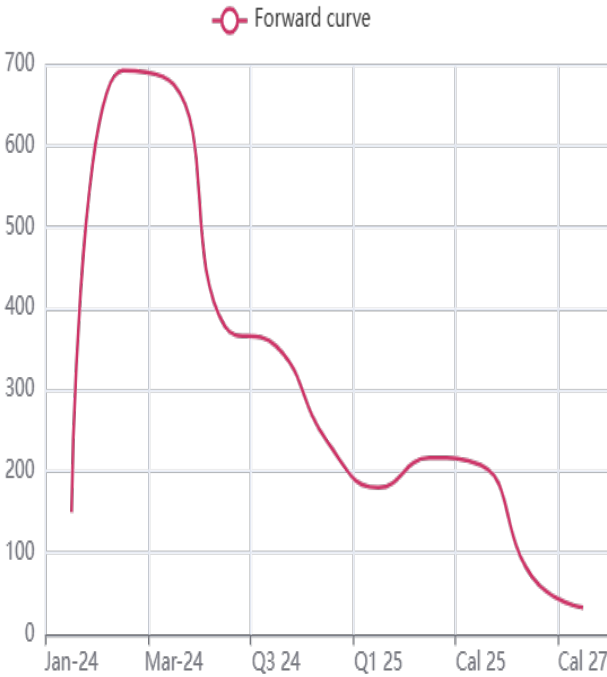
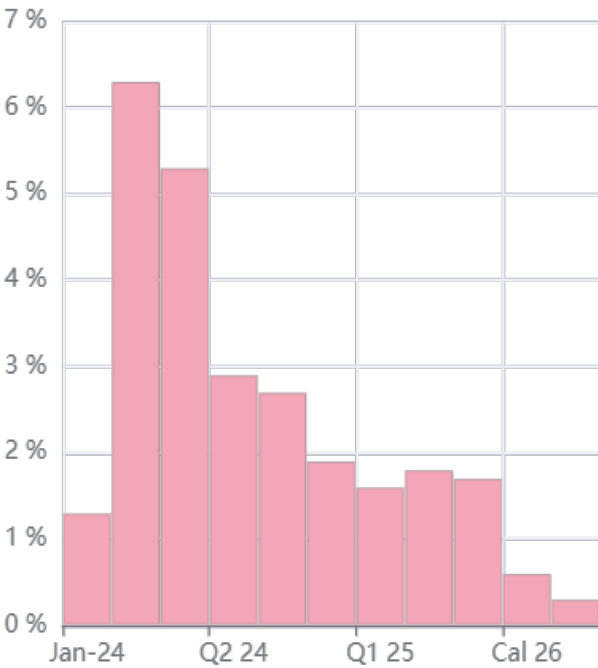
巴拿马型散货船Panamax

4TC	\$/day	WoW	
Jan-24	12,086.00	168.0	1.4 %
Feb-24	11,461.00	561.0	5.1 %
Mar-24	13,346.00	450.0	3.5 %
Q2 24	14,062.00	254.67	1.8 %
Q3 24	13,586.00	261.0	2.0 %
Q4 24	13,229.00	179.0	1.4 %
Q1 25	11,650.00	86.0	0.7 %
Q2 25	12,564.00	135.0	1.1 %
Cal 25	12,046.00	139.0	1.2 %
Cal 26	11,850.00	57.0	0.5 %
Cal 27	11,793.00	14.0	0.1 %



超大灵便型散货船Supramax

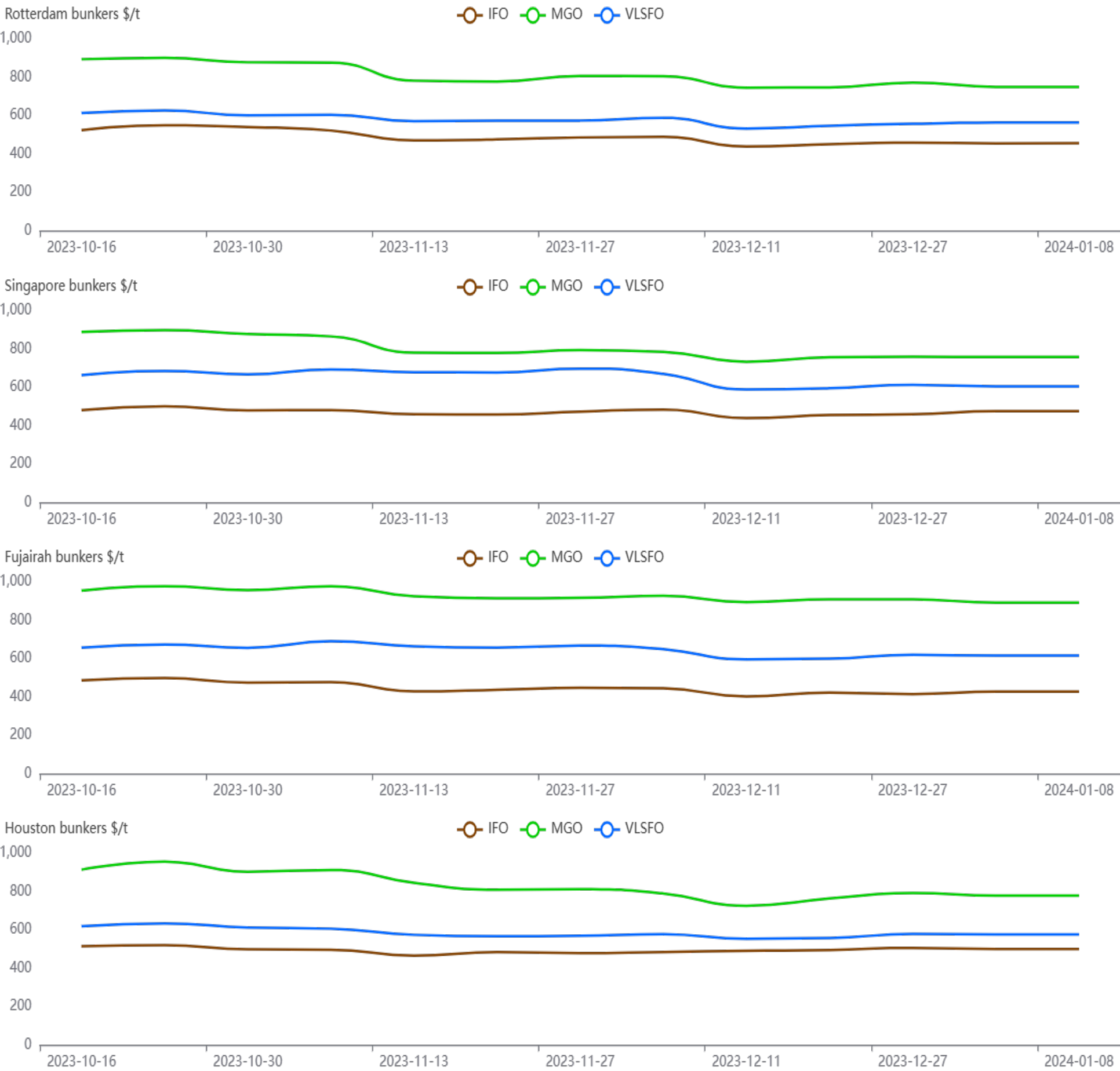
10TC	\$/day	WoW	
Jan-24	12,050.00	150.0	1.3 %
Feb-24	11,613.00	692.0	6.3 %
Mar-24	13,488.00	675.0	5.3 %
Q2 24	13,630.67	378.0	2.9 %
Q3 24	13,342.00	354.0	2.7 %
Q4 24	13,029.00	237.0	1.9 %
Q1 25	11,705.00	180.0	1.6 %
Q2 25	12,242.00	217.0	1.8 %
12,107.75	Cal 25	207.75	1.7 %
Cal 26	11,925.00	71.0	0.6 %
Cal 27	11,854.00	33.0	0.3 %



第六部分 燃油价格 BUNKER PRICE

MP	LO	HO	MO	SP	WoW	W%	M%
zhoushan	648.0	465.0	807.5	183.0	0.0	0.0	15.09
Singapore	606.0	476.0	759.0	130.0	0.0	0.0	-13.04
Rotterdam	563.5	455.5	750.0	108.0	-0.5	-0.46	14.89
Fujairah	616.0	428.5	892.0	187.5	0.0	0.0	-2.85
Houston	576.0	499.5	779.0	76.5	0.0	0.0	23.39

(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	222.0		-3.0	-1.33	-0.98	-23.33
Maize	227.0		-4.0	-1.73	-1.58	-27.99
Soybeans	246.0		-11.0	-4.28	-4.44	-20.67
Rice	262.0		1.0	0.38	1.62	35.74
Barley	221.0		-2.0	-0.9	-1.48	-28.7
Energy	Index		+/-	Weekly	Monthly	YTD
Crude Oil	USD/Bbl	72.95	-2.13	-2.84	3.2	-7.25
Brent	USD/Bbl	77.71	-3.08	-3.81	2.95	-4.79
Natural Gas	USD/MMBtu	2.84	0.32	12.7	18.33	-28.1
Gasoline	USD/Gal	2.07	-0.09	-4.17	0.98	-11.54
Heating Oil	USD/Gal	2.61	-0.06	-2.25	1.16	-14.98
Ethanol	USD/Gal	1.58	-0.09	-5.39	-8.67	-30.09
Naphtha	USD/T	629.23	-7.16	-1.13	1.13	0.76
Propane	USD/Gal	0.7	0.03	4.48	1.45	-9.09
Uranium	USD/Lbs	91.0	0.0	0.0	11.72	87.47
Methanol	CNY/T	2393.0	-49.0	-2.01	-1.85	-8.88
TTF Gas	EUR/MWh	32.44	-1.41	-4.17	-11.34	-53.16
UK Gas	GBp/thm	81.8	-8.9	-9.81	-11.31	-51.98
Industrial	Index		+/-	Weekly	Monthly	YTD
Copper	USD/Lbs	3.78	-0.12	-3.08	-0.26	0.53
Coal	USD/T	131.55	-13.95	-9.59	-12.88	-66.37
Steel	CNY/T	3843.0	-113.0	-2.86	-3.61	-3.49
Iron Ore	USD/T	141.5	-1.0	-0.7	2.91	21.93
Aluminum	USD/T	2261.5	-88.5	-3.77	6.2	-1.96
Iron Ore Fe 62%	USD/T	2261.5	-88.5	-3.77	6.2	-1.96
Metals	Index		+/-	Weekly	Monthly	YTD
Gold	USD/t.oz	2027.9	-39.4	-1.91	1.79	10.24
Silver	USD/t.oz	22.9	-1.16	-4.82	-0.04	-3.94
Platium	USD/t.oz	953.4	-18.8	-1.93	3.65	-11.71
Currencies	Index		+/-	Weekly	Monthly	YTD
EUR/USD	1.09		-0.02	-1.8	0.93	2.83
USD/CNY	7.17		0.02	0.28	-0.28	3.76

第八部分 本周话题 WEEKLY TOPIC



俄罗斯石油的出口受到美国制裁的影响

据hiFleet数据显示，越来越多的油轮数据表明，在美国加大对运输俄罗斯石油的贸易商和航运公司的制裁力度之后，俄罗斯的石油流动呈现减少趋势，可能面临中断。在过去一个月左右的时间里，总共有十几艘油轮在向印度运送石油，自从美国开始加大制裁力度以来，这些船舶要么犹豫不决，要么掉头转向，要么关闭AIS继续前行。这些船只的运动时刻牵动着莫斯科和西方当局的心。美国竭尽全力一方面限制俄罗斯获得石油美元，另一方面又要保持原油供应的微妙路线，限制俄罗斯油价出口应运而生。原本这些油都应该运往印度，印度政府表示，由于价格不够便宜，削减了从俄罗斯进口的石油。新德里方面否认了有关向俄罗斯支付这些石油存在后勤困难的猜测。这些石油大部分是从该国东部出口的索科尔级原油，但一些乌拉尔的旗舰货也被搁置。就在可能出现中断迹象的几周前，美国财政部对俄罗斯石油交易商和国有航运公司Sovcomflot实施了自乌克兰战争开始以来最广泛的制裁。俄罗斯正越来越多地利用神秘交易员和一支所有权和保险都不明确的船队去运输石油，参与俄罗斯石油贸易的油轮这样做相对不寻常。

过去一年，俄罗斯一直是印度最大的原油供应国，但自23年夏天以来，俄罗斯的原油进口量大幅下降。印度政府将原因归咎于俄罗斯原油相对于其他品级的价格较高。但在油价最新下跌之前，美国表示将加大对俄罗斯实施价格上限和更广泛制裁的力度。至少有一家印度炼油厂不得不购买阿布扎比的穆尔班原油，以取代中断的俄罗斯进口。

HiFleet船队在线新近推出了OFAC船舶制裁信息查询，欢迎广大用户使用。

According to hiFleet data, a growing number of tanker data indicates that Russian oil flows are showing a decreasing trend and could face disruption after the United States stepped up sanctions against traders and shipping companies transporting Russian oil. In all, more than a dozen tankers have been carrying oil to India in the past month or so, and since the United States began ramping up sanctions, the ships have either hesitated, turned around, or shut down their AIS to keep going. The movement of these ships is always at the heart of Moscow and the Western authorities. The United States has tried its best to limit Russia's access to petrodollars on the one hand, while maintaining the delicate line of crude oil supplies on the other hand, restricting Russian oil exports came into being. The oil was supposed to go to India, but the Indian government cut imports of Russian oil because it was not cheap enough. New Delhi has dismissed speculation about logistical difficulties in paying Russia for the oil. Most of this oil is Sokol grade crude exported from the east of the country, but some Urals flagships have also been shelved. The signs of a possible disruption come just weeks after the U.S. Treasury Department imposed its broadest sanctions on Russian oil trader and state-owned shipping company Sovcomflot since the start of the war in Ukraine. Russia is increasingly using mystery traders and a fleet of ships with unclear ownership and insurance to transport oil, a relatively unusual move for tankers involved in the Russian oil trade. Russia has been India's largest supplier of crude oil for the past year, but its crude imports have fallen sharply since the summer of '23. The Indian government blamed the high price of Russian crude compared to other grades. But the latest drop in oil prices came after the US said it would step up its efforts to impose price caps and broader sanctions on Russia. At least one Indian refinery has had to buy ABU Dhabi's Murban crude to replace disrupted Russian imports. HiFleet fleet online recently launched OFAC ship sanctions information inquiry, welcome users to find.