



2024年 第9周市场周报

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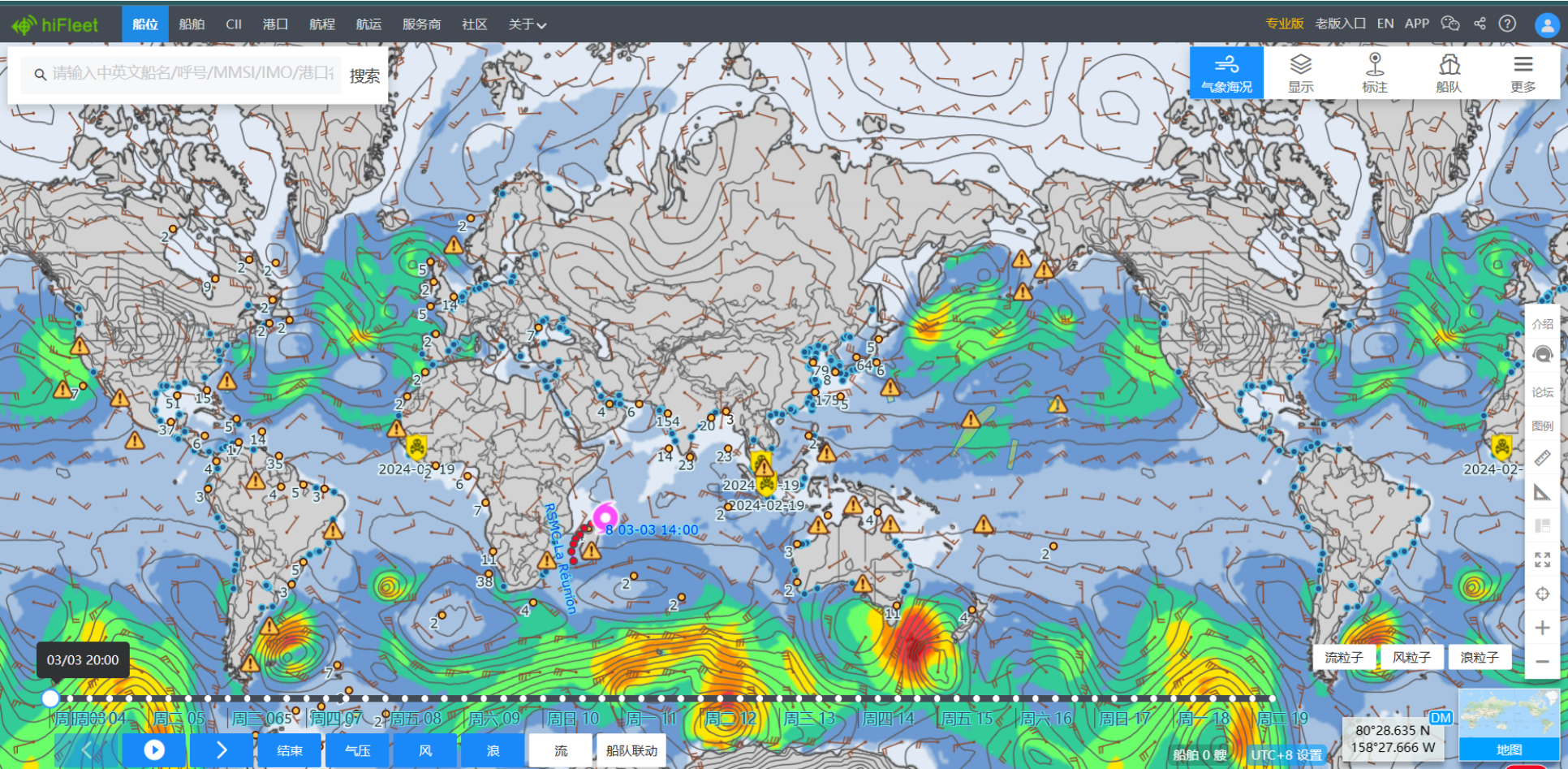
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最新商品价格 LATEST COMMODITIES PRICE

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1040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 1040 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5-6级逐步增强到7-8级，相关海域海浪将从2米中浪大浪到3米大浪；台湾海峡风力有7-8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5-6级，有2米中浪。辽东湾最大浮冰范围20海里；黄海北部最大浮冰范围5海里。黄海、东海和北部湾未来可能有连续轻雾。大西洋和太平洋北部区域低压活动开始减弱，海域海况逐步改善。 The coming week affected by the cold air the wind in Bohai Sea, Yellow Sea and China East Sea will gradually become strong from near breeze to gale with the seas from moderate to rough. The wind in the Taiwan Strait might reach gale and the sea in the Taiwan Strait happens to experience very rough. In most of the South China Sea the wind is breeze with moderate sea. Low-pressure in the north of North Atlantic Ocean and Pacific are becoming easing, sea conditions become easing as well.

海盗事件 Piracy

最近一周没有最新海盗事件报道。 There is no Pirate Report for the latest week.

海上事件 Marine Incidents

Rubymar号是胡塞武装反航运行动中最引人注目的船舶，最终于3月2日在红海沉没。该船据hiFleet报道北京时间2月19日被胡赛武装导弹袭击，所幸没有船员受伤，该船载重吨3万2千载重吨，1997年建造。 The Rubymar, the highest-profile casualty of the Houthi group's campaign against shipping, has finally sunk in the Red Sea. According to hiFleet data, the Vessel was attacked by a Houthi missile on February 19, but fortunately no crew members were injured. The ship has a deadweight of 32,000 tons and was built in 1997.

其它 Others

无。 Nil.

备注 Remark

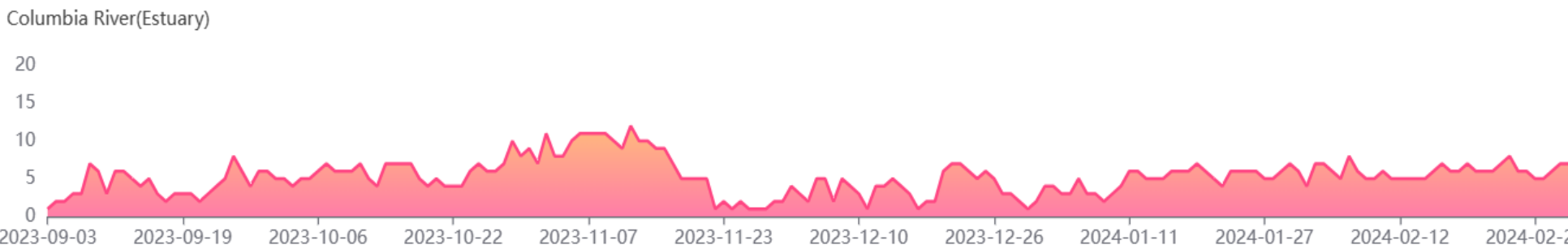
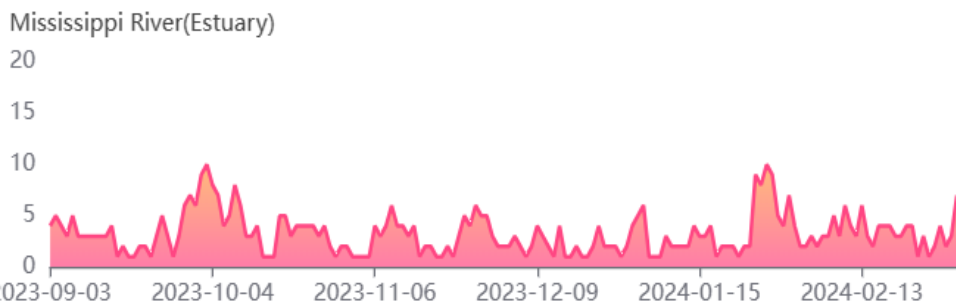
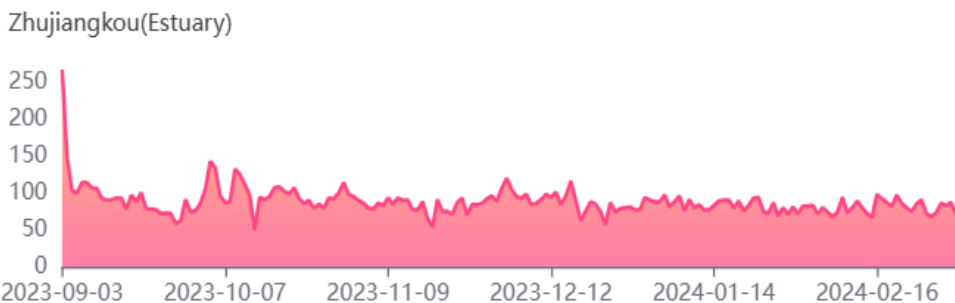
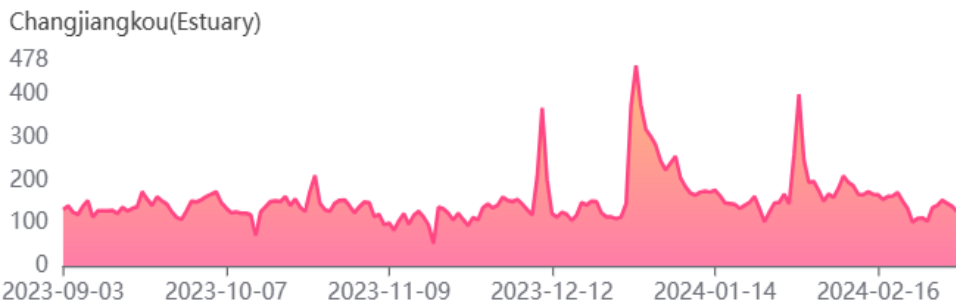
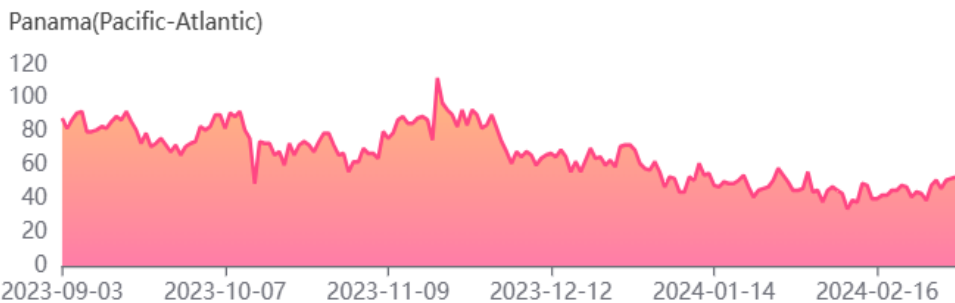
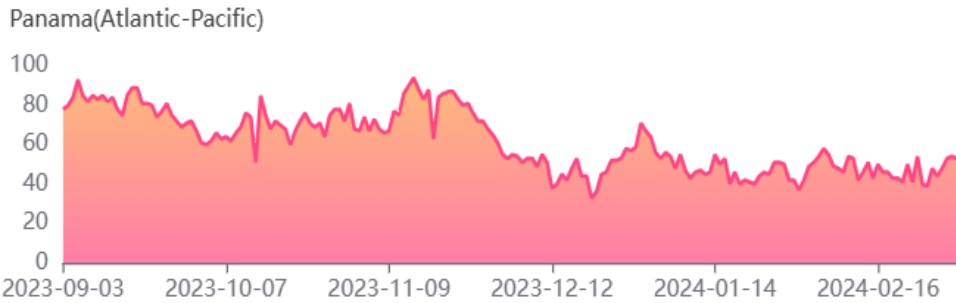
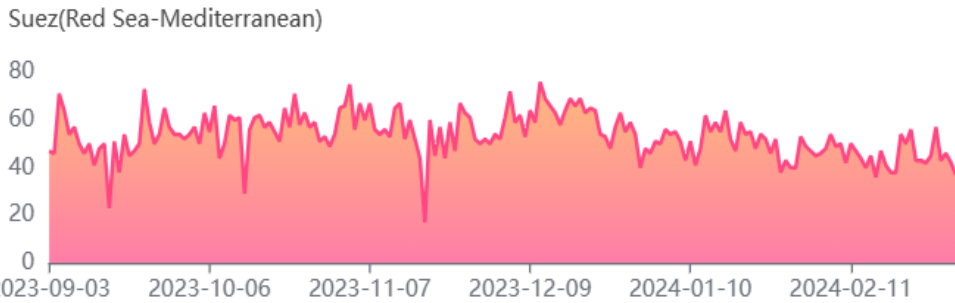
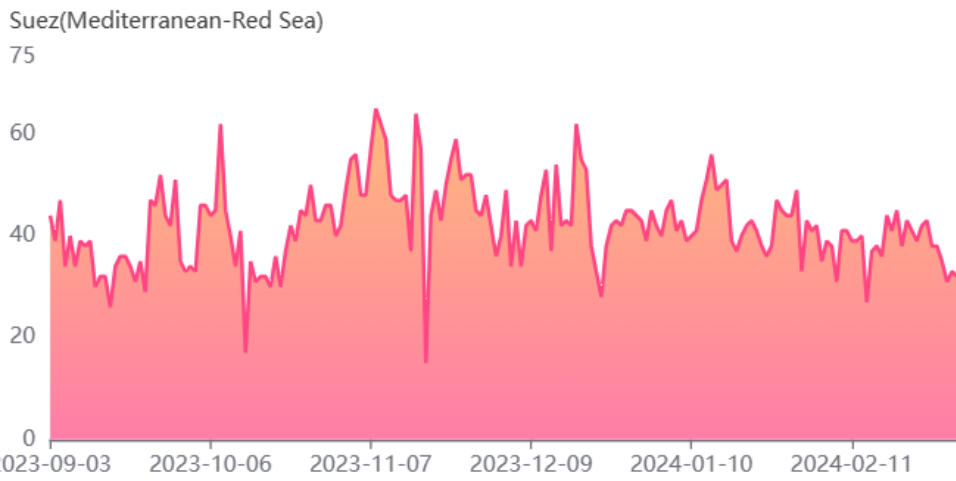
本报告数据截止时间为2024年3月3日北京时间17点；所有数据和或观点仅供参考，在任何情况下本公司及其员工不承担任何风险。 The data deadline for this report is Beijing time 17 hours on Mar 3 of 2024; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

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	37	1318	-8	-140
Miss.Riv.	7	92	4	-5
CJK	127	4473	-49	-576
Pa.Atlan.	53	1392	21	52
Colum.Riv.	7	173	-2	17
Suez.Med.	32	1106	-41	-144
Pa.Pac.	53	1288	28	-142
ZJK	71	2336	-52	-38

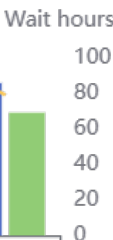
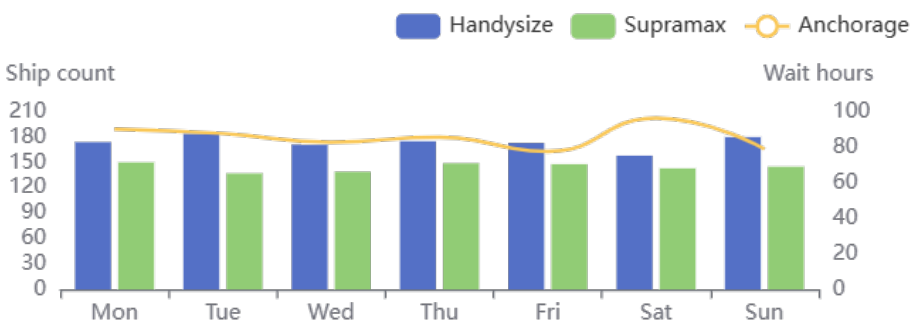


(P.N-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

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

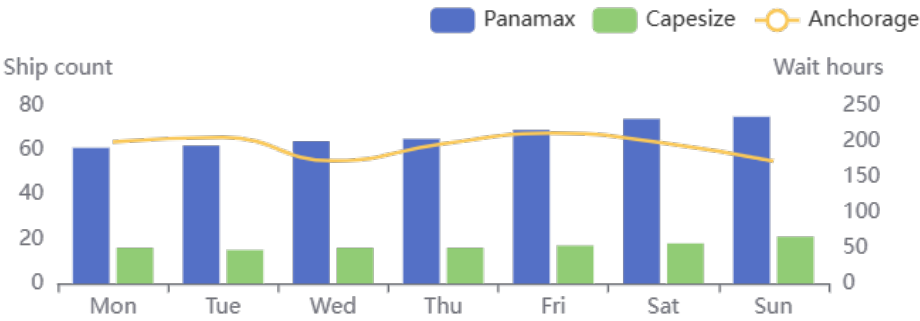
Type	M	T	W	Th	F	Sat	Sun
HDY	174	184	171	175	173	158	180
SMX	150	137	139	149	148	143	145
WT.h.	90.2	87.7	82.9	85.7	77.6	96.4	79



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

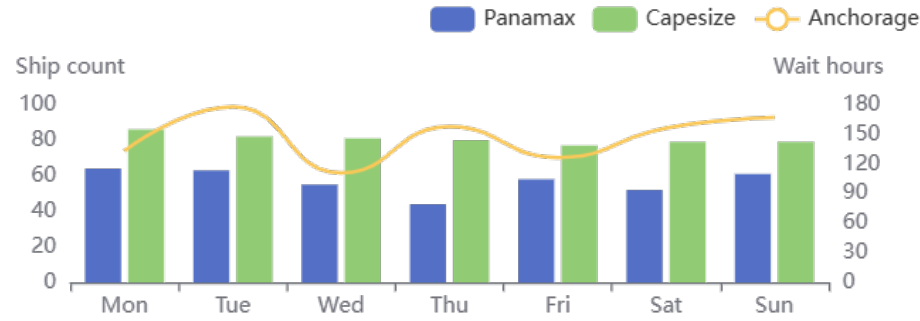
Type	M	T	W	Th	F	Sat	Sun
Pan.	61	62	64	65	69	74	75
Cap	16	15	16	16	17	18	21
WT.h.	199.1	205.3	172.4	196.4	211.3	197.4	172



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

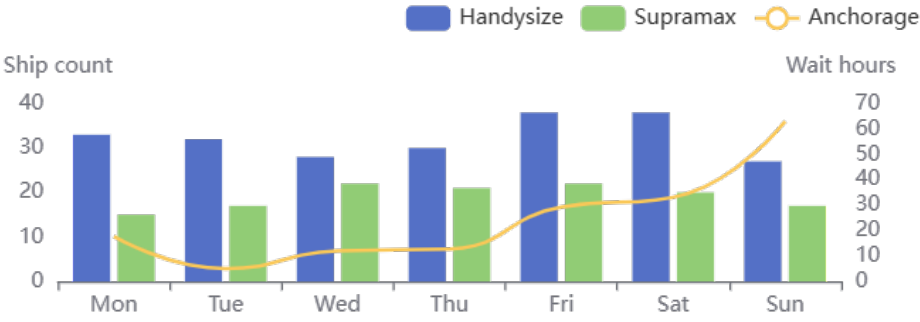
Type	M	T	W	Th	F	Sat	Sun
Pan.	64	63	55	44	58	52	61
Cap	86	82	81	80	77	79	79
WT.h.	133.3	177.8	110.8	157.7	126.5	156.3	167



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

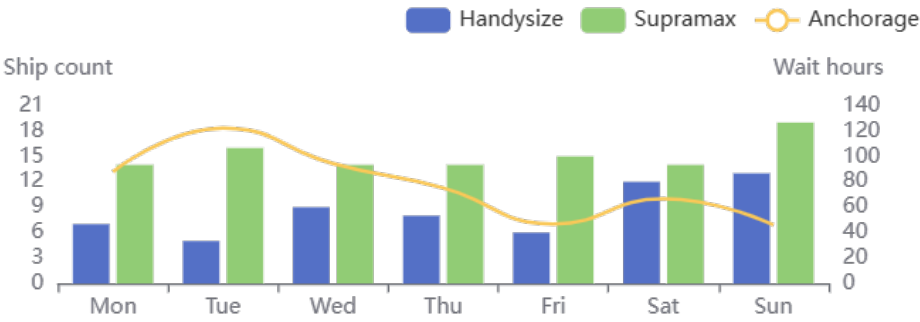
Type	M	T	W	Th	F	Sat	Sun
HDY	33	32	28	30	38	38	27
SMX	15	17	22	21	22	20	17
WT.h.	17.7	5	12.1	12.8	29.3	33.1	63



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

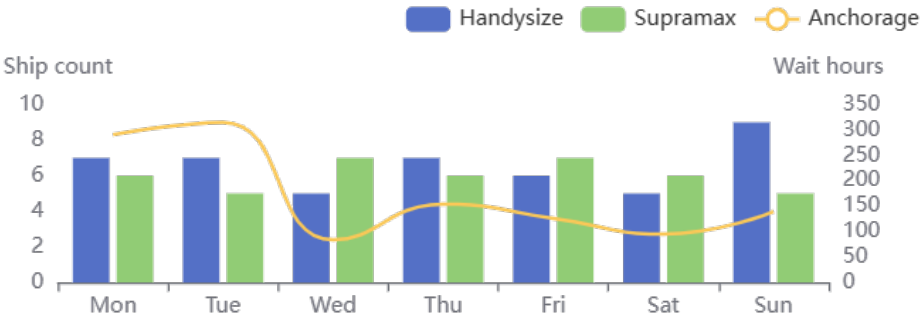
Type	M	T	W	Th	F	Sat	Sun
HDY	7	5	9	8	6	12	13
SMX	14	16	14	14	15	14	19
WT.h.	88	122.3	94.4	75.2	46.9	66.75	46



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

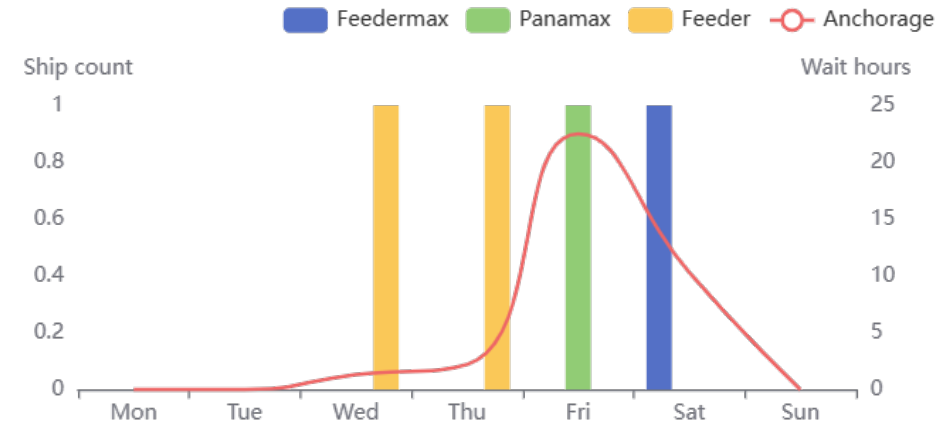
Type	M	T	W	Th	F	Sat	Sun
HDY	7	7	5	7	6	5	9
SMX	6	5	7	6	7	6	5
WT.h.	290.8	314.8	83.8	154.1	126.2	95	139.5



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

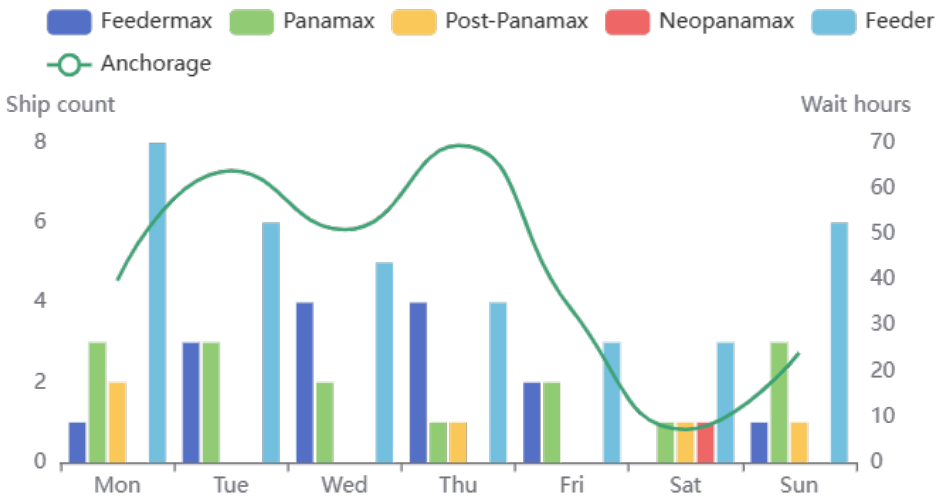
Type	M	T	W	Th	F	Sat	Sun
F.ma.	0	0	0	0	0	1	0
Pan.	0	0	0	0	1	0	0
PPx	0	0	0	0	0	0	0
NPx	0	0	0	0	0	0	0
Fd	0	0	1	1	0	0	0
WT.h.	0.0	0.0	1.3	2.2	22.5	10.3	0.0
Ulcw	0	0	0	0	0	0	0



最近一周上海区域集装箱船锚泊数量和平均等待时长

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

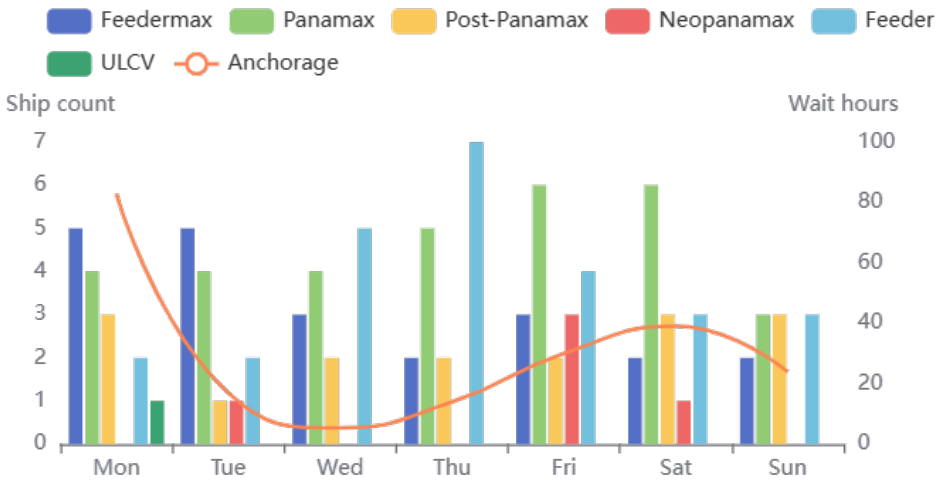
Type	M	T	W	Th	F	Sat	Sun
F.ma.	1	3	4	4	2	0	1
Pan.	3	3	2	1	2	1	3
PPx	2	0	0	1	0	1	1
NPx	0	0	0	0	0	1	0
Fd	8	6	5	4	3	3	6
Ulcw	0	0	0	0	0	0	0
WT.h.	39.9	63.9	51	69.45	33.4	7.25	24



最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

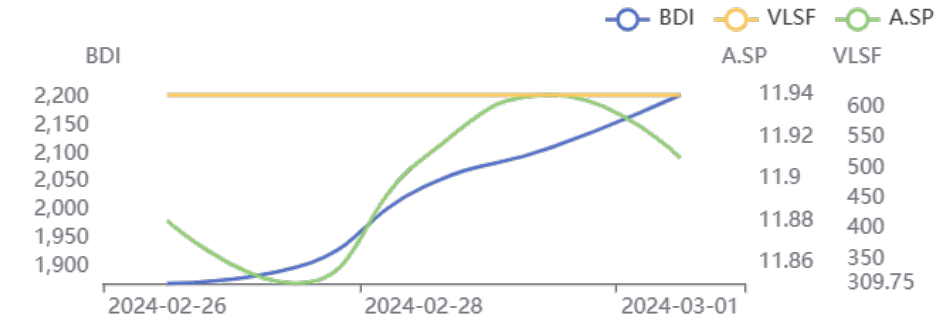
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

Type	M	T	W	Th	F	Sat	Sun
F.ma.	5	5	3	2	3	2	2
Pan.	4	4	4	5	6	6	3
PPx	3	1	2	2	2	3	3
NPx	0	1	0	0	3	1	0
Fd	2	2	5	7	4	3	3
Ulcw	1	0	0	0	0	0	0
WT.h.	82.9	17	5.4	14	30	39.1	24



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

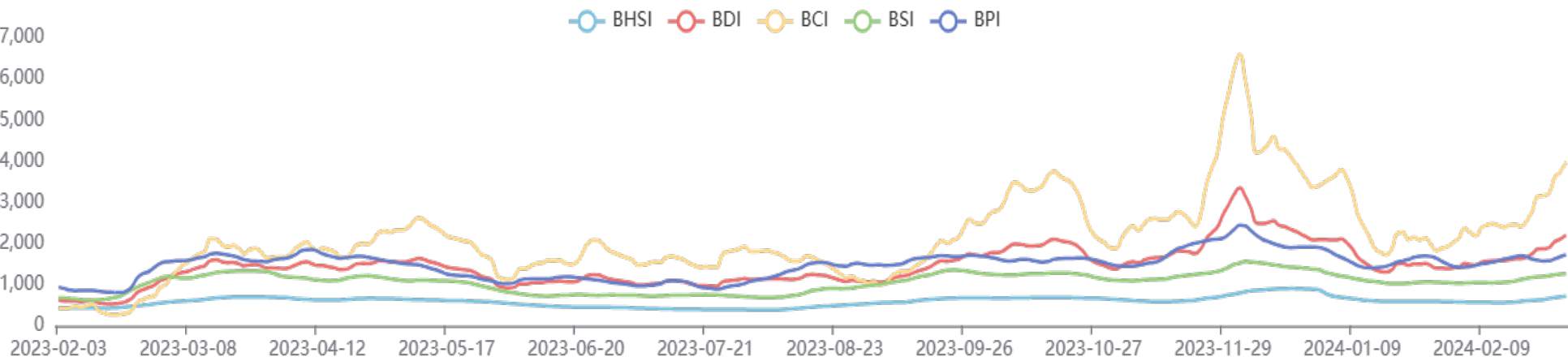
Type	M	T	W	Th	F	Sat	Sun
BDI	1578	1581	1627	1681	1723		
VLSF	619.50	619.50	619.50	619.50	619.50		
A.SP	11.88	11.85	11.91	11.94	11.91	11.98	



第三部分 航运市场 SHIPPING MARKET

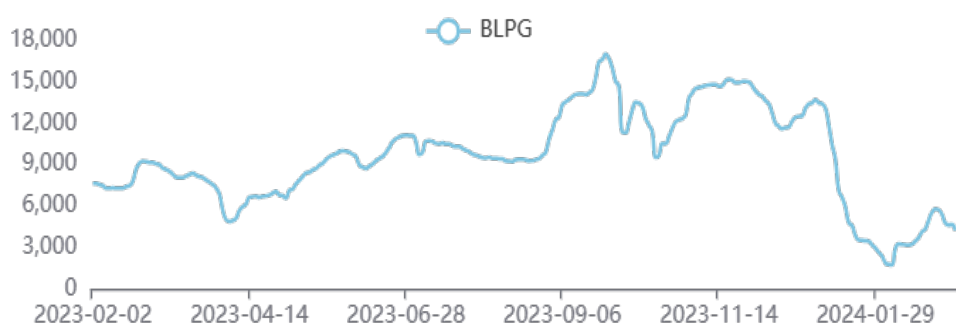
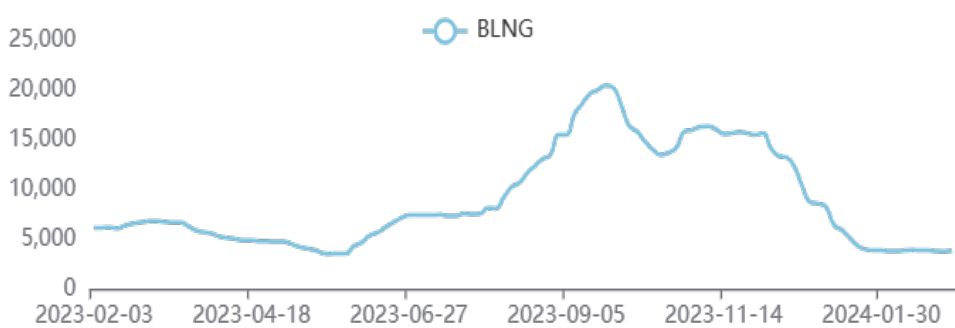
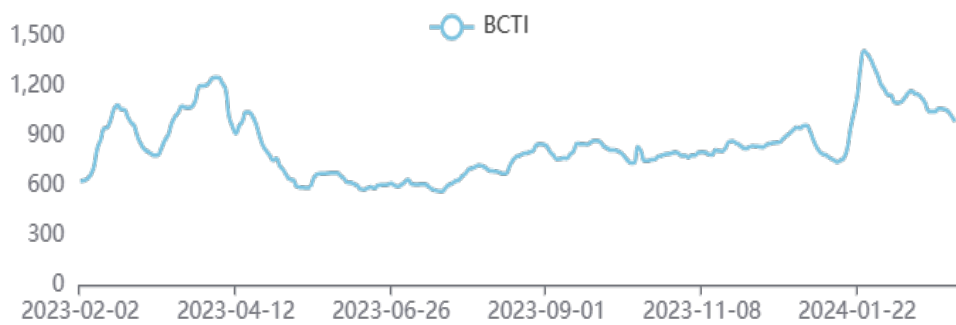
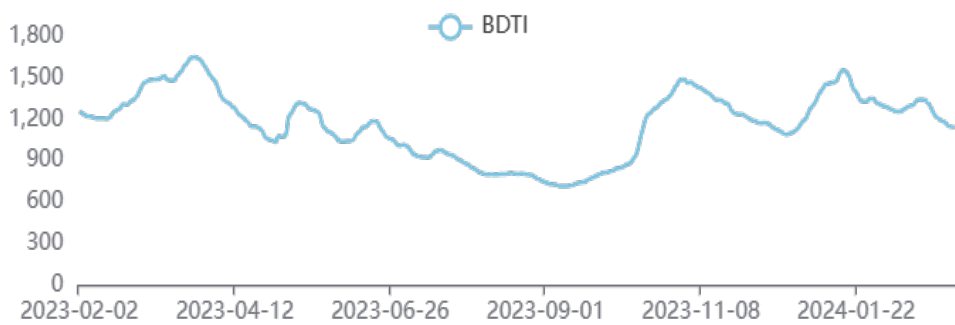
波罗的海干散货指数Baltic Dry Index

Type	PI	WoW	W%	M%	y%
BDI	2203	337.0	18.06	56.57	100.45
BCI	3977	832.0	26.45	95.91	328.09
BPI	1723	128.0	8.03	19.32	13.73
BSI	1267	78.0	6.56	21.71	9.6
BHSI	722	94.0	14.97	23.42	29.86

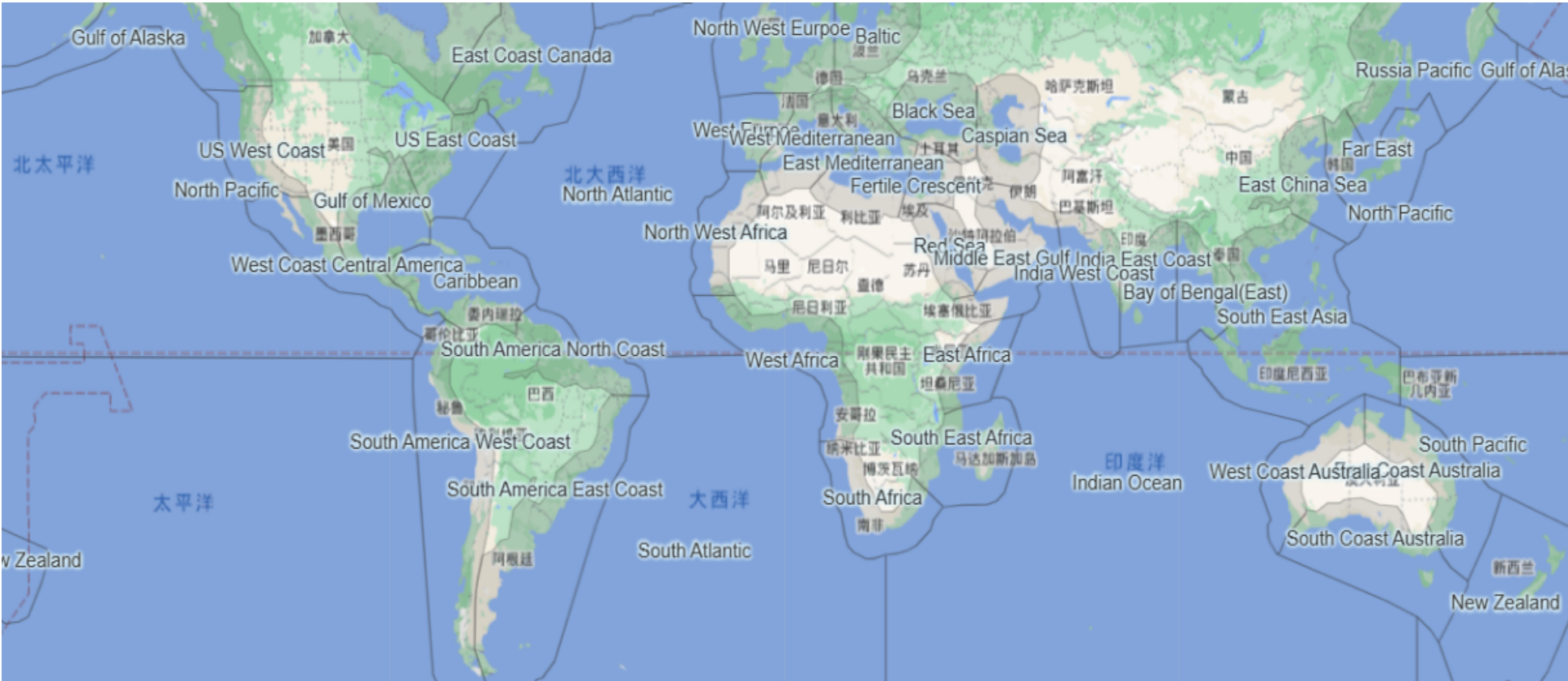


能源运价指数Energy Shipping Index

Type	PI	WoW	W%	M%	y%
BDTI	1142	-67.0	-5.54	-11.27	-21.51
BCTI	986	-76.0	-7.16	-14.04	20.83
BLNG	3832	42.0	1.11	1.16	-43.81
BLPG	4208	-1514.0	-26.46	138.82	-53.49



第四部分 运力分布 SUPPLY DISTRIBUTION

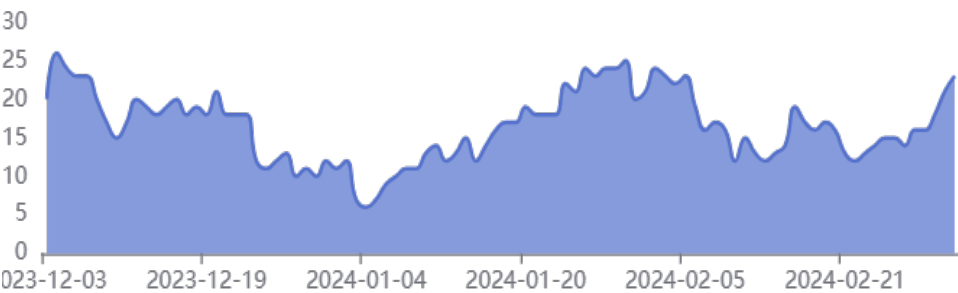


好望角型散货船 Capesize

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.

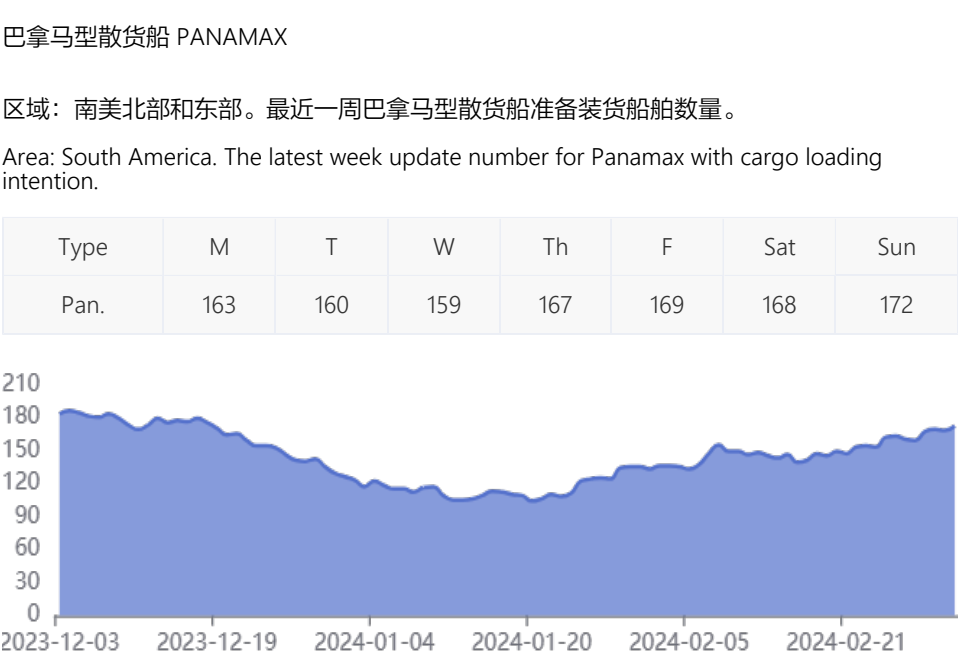
Type	M	T	W	Th	F	Sat	Sun
Cape	15	14	16	16	18	21	23



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.

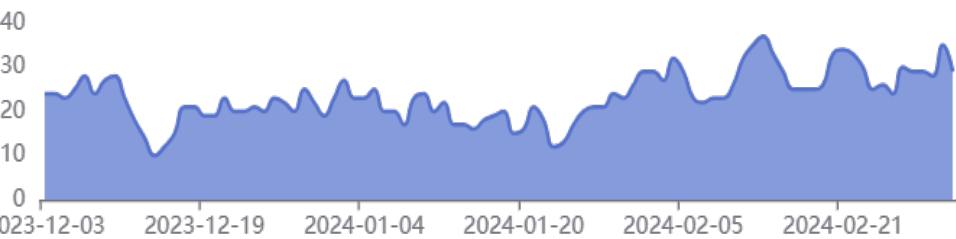
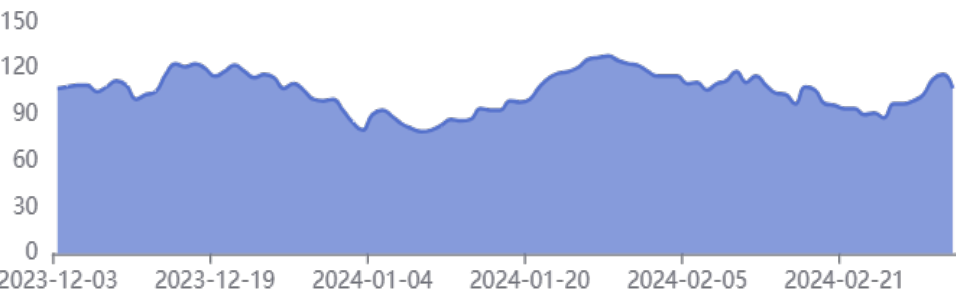
Type	M	T	W	Th	F	Sat	Sun
Cape	24	30	29	29	28	35	29



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	97	97	99	103	113	116	107

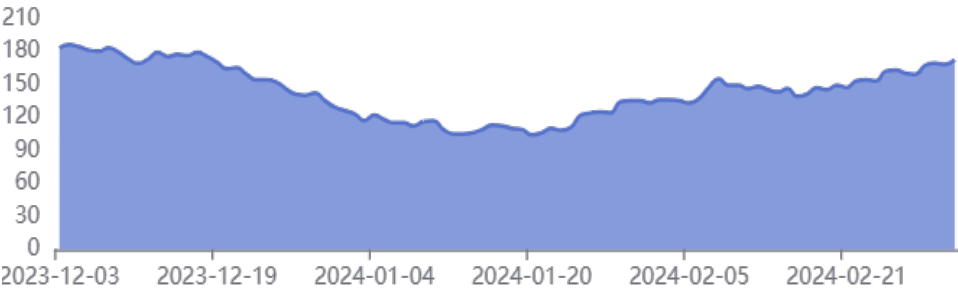


巴拿马型散货船 PANAMAX

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.

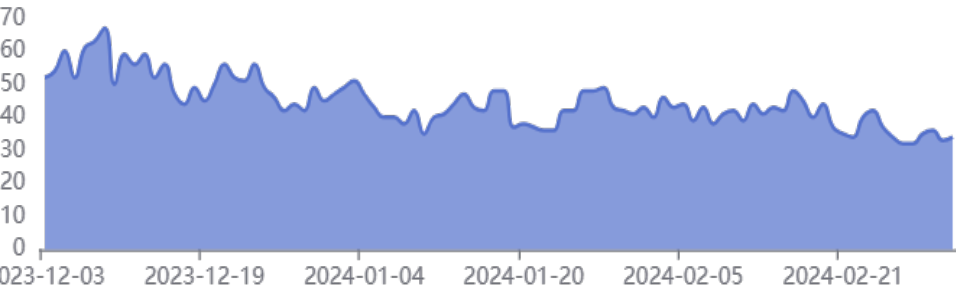
Type	M	T	W	Th	F	Sat	Sun
Pan.	163	160	159	167	169	168	172



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.

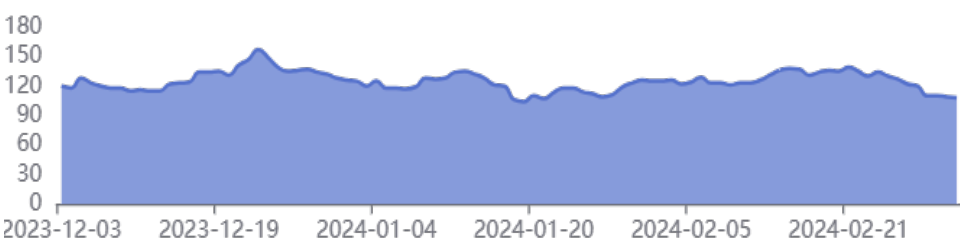
Type	M	T	W	Th	F	Sat	Sun
Pan.	44	41	44	46	45	46	43



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.	127	122	120	110	110	109	108

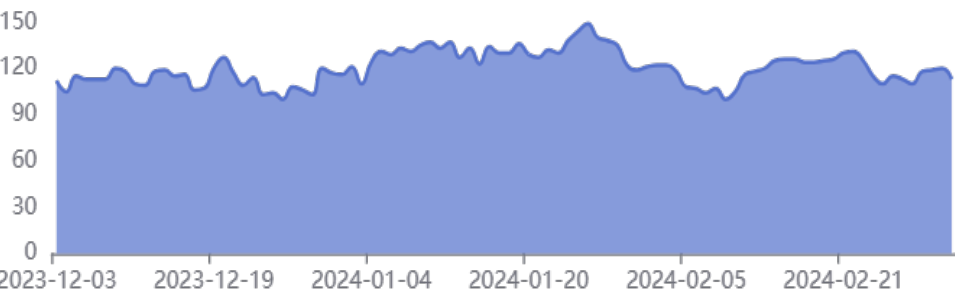


超大灵便型散货 SUPRAMAX

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.

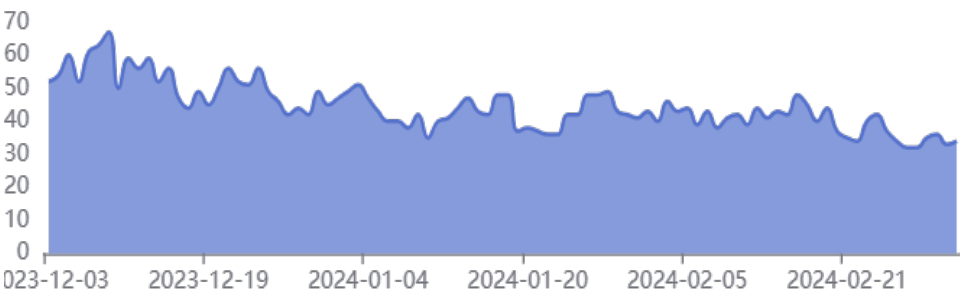
Type	M	T	W	Th	F	Sat	Sun
SMX	115	113	110	118	119	120	113



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.

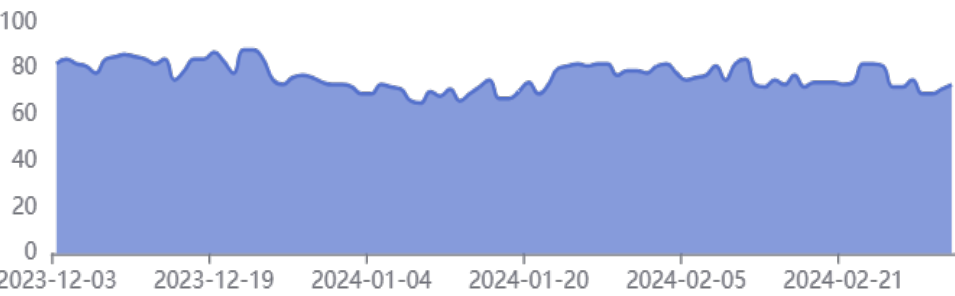
Type	M	T	W	Th	F	Sat	Sun
SMX	34	32	32	35	36	33	34



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.

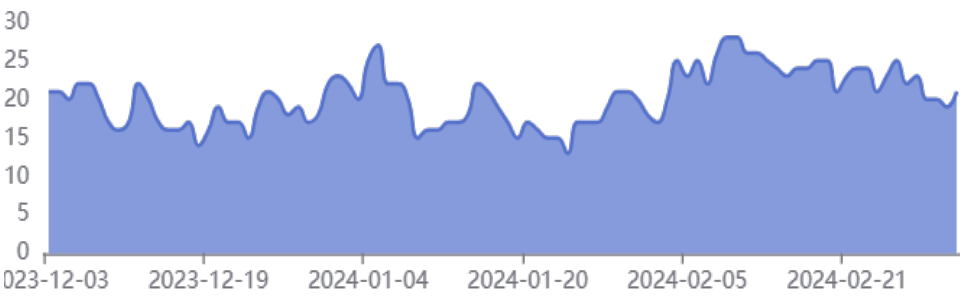
Type	M	T	W	Th	F	Sat	Sun
SMX	25	22	23	20	20	19	21



区域：南美的北部和东部。最近一周超大灵便型散货船准备装货船舶数量。

Area: South America. The latest week update number for Supramax with cargo loading intention.

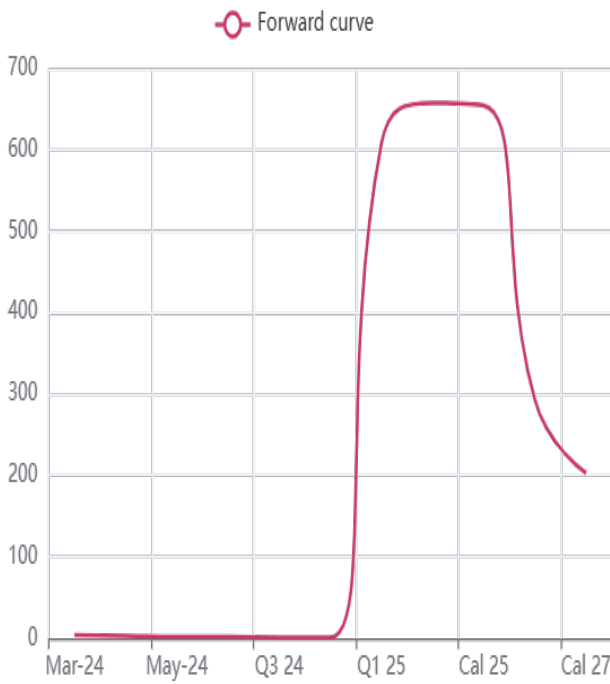
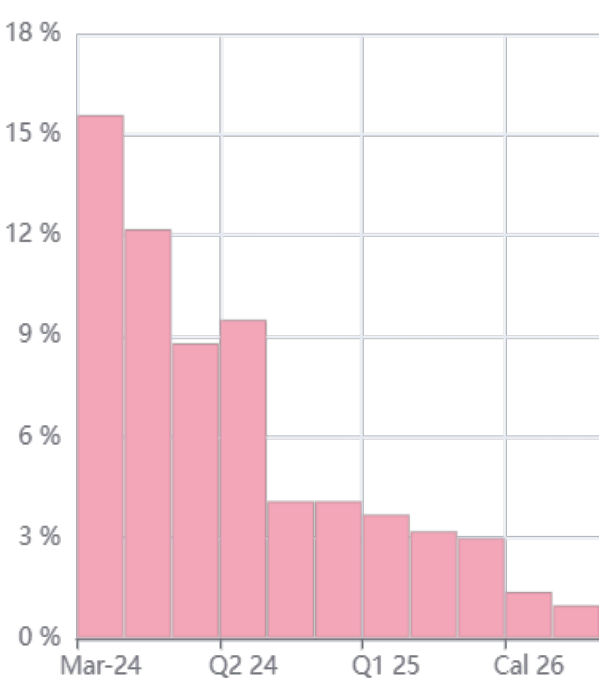
Type	M	T	W	Th	F	Sat	Sun
SMX	72	72	75	69	69	71	73



第五部分 远期运价协议 FFA

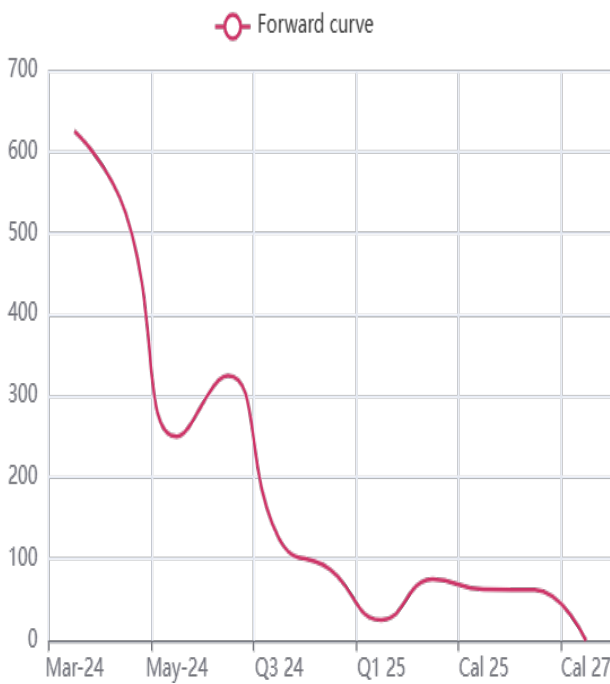
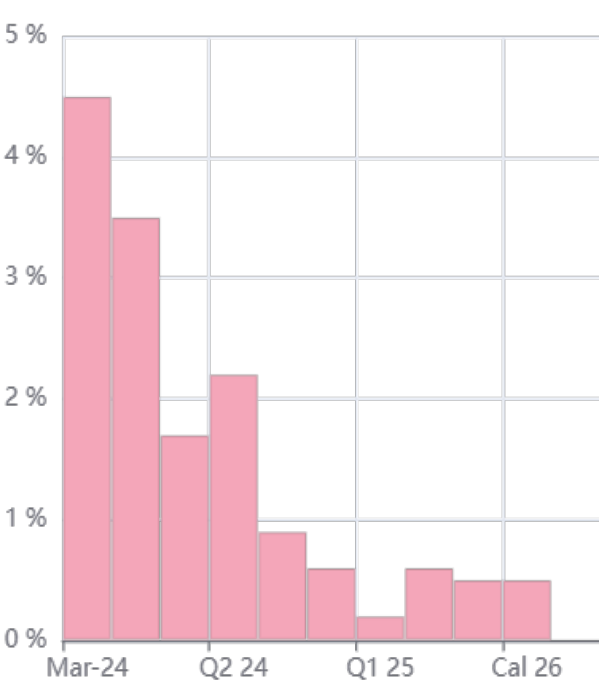
好望角型散货船Capesize

5TC	\$/day	WoW	
Mar-24	34,911.00	4718.0	15.6 %
Apr-24	34,568.00	3757.0	12.2 %
May-24	33,179.00	2672.0	8.8 %
Q2 24	32,963.33	2862.0	9.5 %
Q3 24	28,211.00	1118.0	4.1 %
Q4 24	27,907.00	1089.0	4.1 %
Q1 25	17,050.00	607.0	3.7 %
Q2 25	21,121.00	657.0	3.2 %
Cal 25	22,143.00	654.0	3.0 %
Cal 26	20,643.00	293.0	1.4 %
Cal 27	19,539.00	203.0	1.0 %



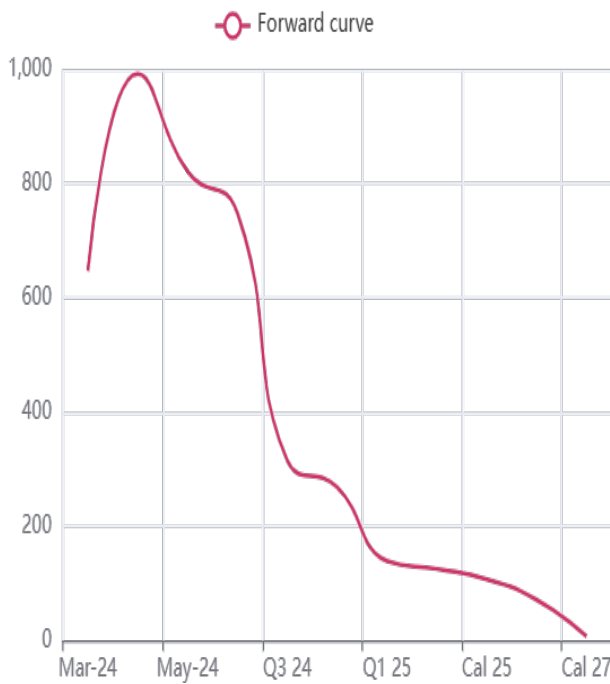
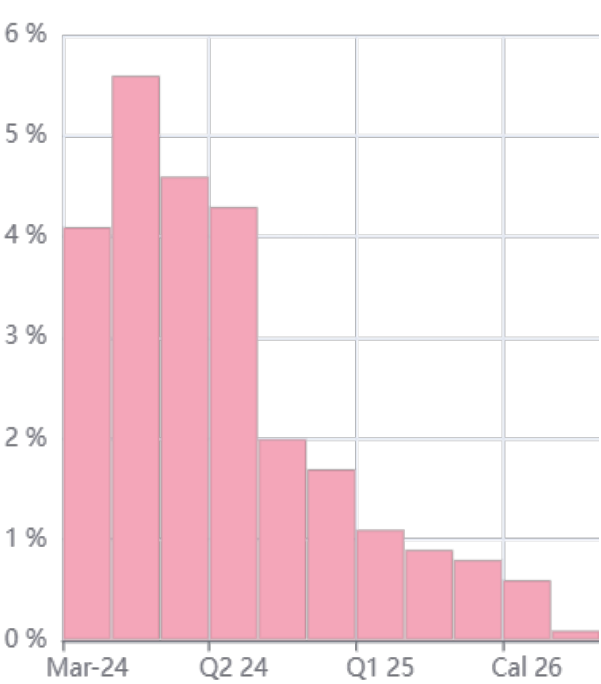
灵便型散货船Handysize

7TC	\$/day	WoW	
Mar-24	14,563.00	625.0	4.5 %
Apr-24	15,475.00	525.0	3.5 %
May-24	14,950.00	250.0	1.7 %
Q2 24	14,866.67	325.0	2.2 %
Q3 24	13,913.00	125.0	0.9 %
Q4 24	13,550.00	87.0	0.6 %
Q1 25	12,150.00	25.0	25.0
Q2 25	12,567.00	75.0	0.6 %
Cal 25	12,462.75	62.5	0.5 %
Cal 26	11,925.00	62.0	0.5 %
Cal 27	11,638.00	0.0	0.0 %



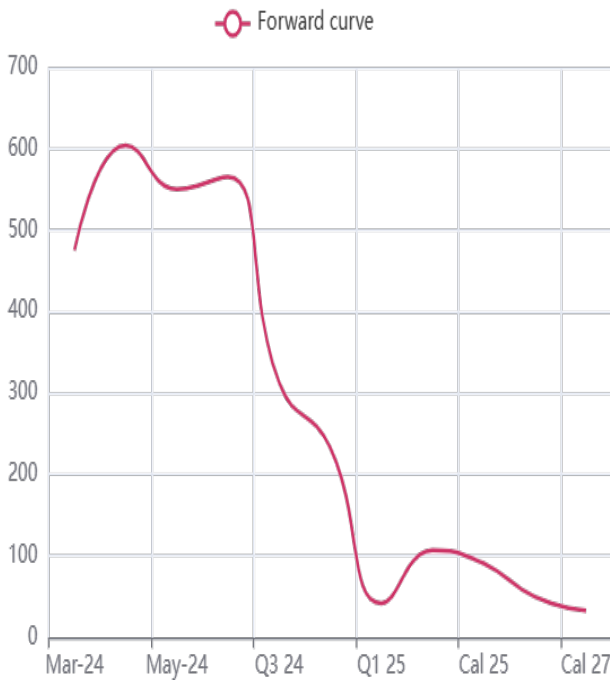
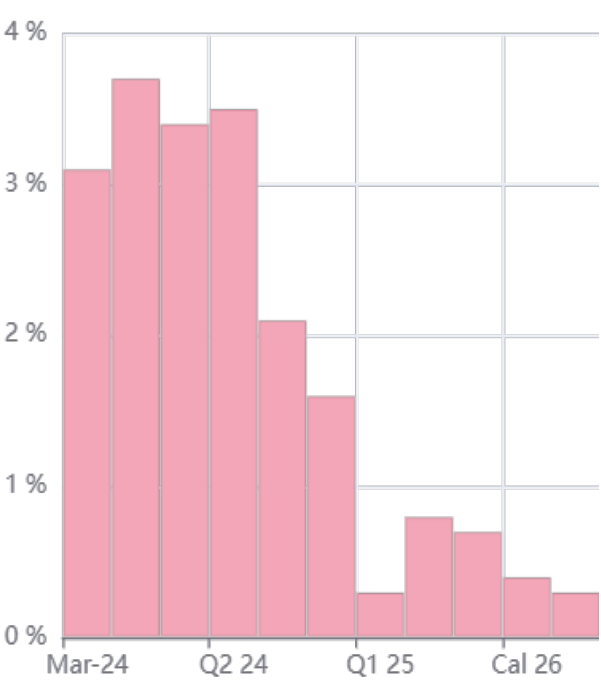
巴拿马型散货船Panamax

4TC	\$/day	WoW	
Mar-24	16,611.00	647.0	4.1 %
Apr-24	18,696.00	992.0	5.6 %
May-24	18,500.00	821.0	4.6 %
Q2 24	18,157.00	748.33	4.3 %
Q3 24	16,336.00	315.0	2.0 %
Q4 24	15,700.00	268.0	1.7 %
Q1 25	13,243.00	139.0	1.1 %
Q2 25	14,271.00	125.0	0.9 %
Cal 25	13,836.00	107.0	0.8 %
Cal 26	12,664.00	71.0	0.6 %
Cal 27	12,264.00	7.0	0.1 %



超大灵便型散货船Supramax

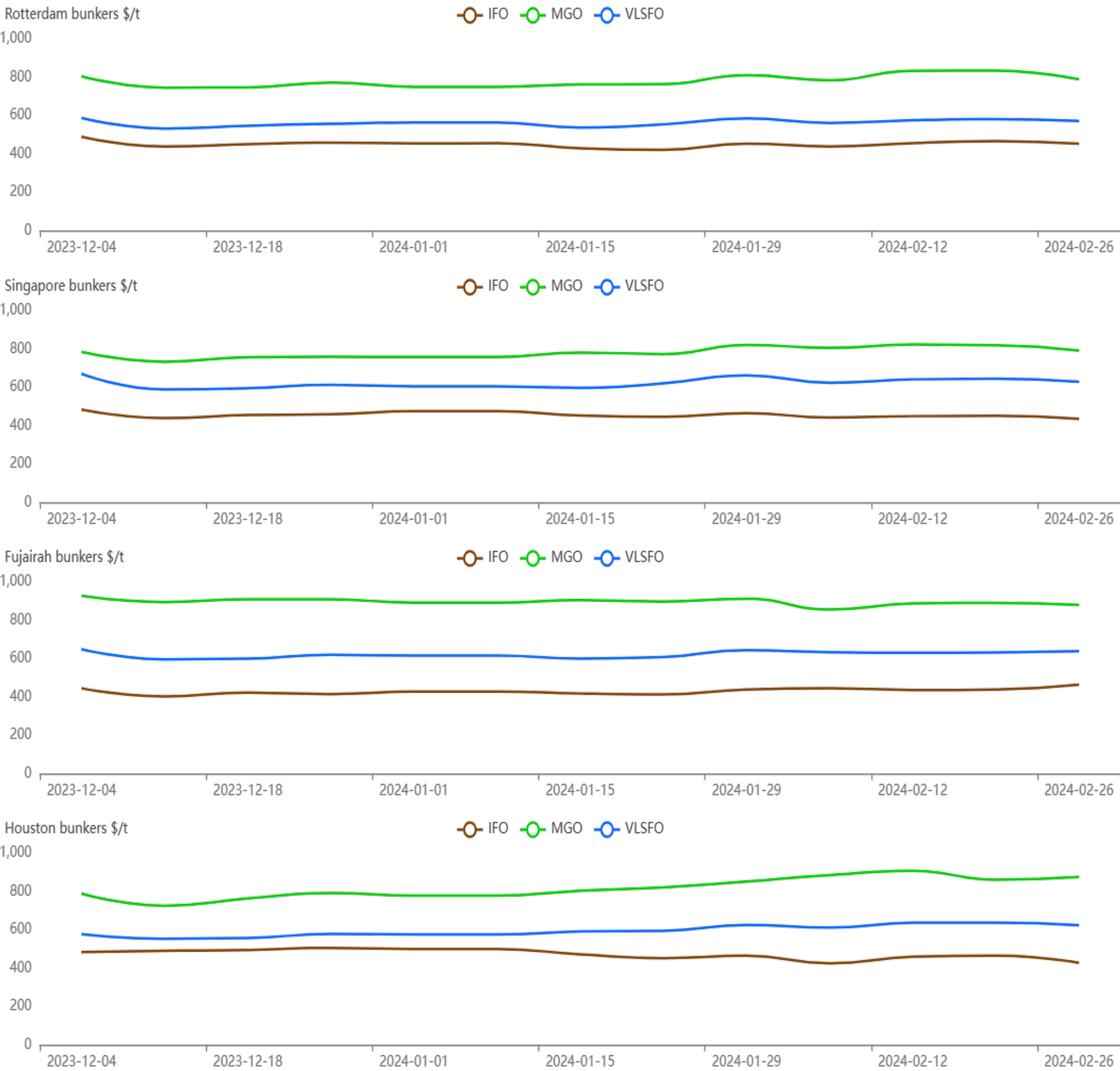
10TC	\$/day	WoW	
Mar-24	15,567.00	475.0	3.1 %
Apr-24	16,979.00	604.0	3.7 %
May-24	16,683.00	550.0	3.4 %
Q2 24	16,504.00	565.33	3.5 %
Q3 24	15,238.00	313.0	2.1 %
Q4 24	14,525.00	233.0	1.6 %
Q1 25	12,567.00	42.0	0.3 %
Q2 25	13,216.00	107.0	0.8 %
13,053.75	Cal 25	90.75	0.7 %
Cal 26	12,233.00	50.0	0.4 %
Cal 27	12,025.00	33.0	0.3 %



第六部分 燃油价格 BUNKER PRICE

MP	LO	HO	MO	SP	WoW	W%	M%
zhoushan	636.0	445.0	829.0	191.0	0.0	0.0	0.53
Singapore	629.5	436.0	792.5	193.5	-1.0	-0.51	-1.78
Rotterdam	572.5	453.5	789.0	119.0	4.0	3.48	-9.16
Fujairah	638.5	464.0	880.0	174.5	-19.0	-9.82	-14.88
Houston	624.5	428.0	875.5	196.5	24.5	14.24	22.81

(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	205.0		-2.0	-0.97	-5.96	-27.46
Maize	188.0		-3.0	-1.57	-10.05	-39.49
Soybeans	259.0		42.0	19.35	17.19	-13.86
Rice	210.0		-52.0	-19.85	-21.05	6.46
Barley	207.0		-2.0	-0.96	-5.48	-30.7
Energy	Index		+/-	Weekly	Monthly	YTD
Crude Oil	USD/Bbl	76.01	-2.81	-3.57	-2.48	-1.45
Brent	USD/Bbl	81.08	-1.76	-2.12	-2.15	-3.2
Natural Gas	USD/MMBtu	1.67	0.12	7.74	-21.6	-24.77
Gasoline	USD/Gal	2.27	-0.05	-2.16	-0.87	-6.58
Heating Oil	USD/Gal	2.68	-0.1	-3.6	-5.96	-2.9
Ethanol	USD/Gal	1.51	0.0	0.0	-5.03	-31.05
Naphtha	USD/T	660.09	-3.2	-0.48	3.0	-7.95
Propane	USD/Gal	0.9	-0.02	-2.17	12.5	9.76
Uranium	USD/Lbs	101.95	-1.25	-1.21	-3.82	97.0
Methanol	CNY/T	2545.0	-48.0	-1.85	1.6	-1.89
TTF Gas	EUR/MWh	23.15	-1.39	-5.66	-19.62	-54.56
UK Gas	GBp/thm	57.03	-2.68	-4.49	-20.11	-54.53
Industrial	Index		+/-	Weekly	Monthly	YTD
Copper	USD/Lbs	3.83	0.02	0.52	-0.26	-6.81
Coal	USD/T	119.4	0.15	0.13	-6.06	-42.98
Steel	CNY/T	3738.0	-153.0	-3.93	-5.41	-10.23
Iron Ore	USD/T	123.5	-4.5	-3.52	-10.18	-3.14
Aluminum	USD/T	2185.0	-27.5	-1.24	-2.63	-9.99
Iron Ore Fe 62%	USD/T	2185.0	-27.5	-1.24	-2.63	-9.99
Metals	Index		+/-	Weekly	Monthly	YTD
Gold	USD/t.oz	2034.0	13.4	0.66	0.3	10.46
Silver	USD/t.oz	22.7	-0.4	-1.73	-0.87	3.99
Platium	USD/t.oz	890.5	-16.2	-1.79	-1.86	-3.52
Currencies	Index		+/-	Weekly	Monthly	YTD
EUR/USD	1.08		0.0	0.0	0.0	0.93
USD/CNY	7.21		5.95	472.22	0.28	5.1

第八部分 本周话题 WEEKLY TOPIC



集装箱航运市场

自2023年12月下旬红海形式变得严峻以来，集装箱航运市场快速走强，因为红海、亚丁湾的集装箱船的绕航对该行业的供需平衡短期产生重大影响。大多数受影响的東西向航线的集装箱船都选择了经过好望角的更长的替代航线，自12月中旬以来，集装箱贸易的平均运输里程大概上升了10%，短期失衡的供需导致运费大幅上涨，租船费也出现上涨。上海集装箱运价指数SCFI从12月初的平均约1000点跃升至1月份的约2200点，在1月底和2月初集装箱运输费率企稳。

但由于红海航线中断，一些班轮公司暂停了有关亚欧航线长期货运合同的讨论，这使得想要确定长期费率水平变得困难。相对集装箱运费，集装箱的期租水平反应较慢，但整个1月份集装箱的期租水平趋势向上，较23年12月整体平均上涨20%。

在集装箱新船交付量强劲的同时，红海航线的中断给集装箱运输行业带来了战略管理的挑战，集装箱运营商重新规划了好望角的航线，短期内对集装箱船舶需求的增加吸收了2024年第一季度的大部分新增集装箱运力。然而，一旦红海局势缓解，预计供应压力将再次显现，并导致市场再次疲软。目前红海市场的混乱并不像新冠疫情那样严重，后者对全球供应链和物流产生了重大影响。

据hiFleet数据显示，2024年1月份集装箱船的平均航速发生显著提高，与2023年的平均航速相比，整个行业的航速提高了1%，而大型集装箱航运更是达到了16节的高点，比2023年的平均航速提高了7%。

当前集装箱运输市场的主要驱动因素来自红海局势。据hiFleet数据显示，1月份下旬苏伊士运河集装箱船过境量与12月相比下降约80%，超过500艘船舶通过好望角绕航。展望未来，当前红海局势尚不稳定，许多航运公司第一季度绕航好望角政策基本不变，以此为基础进行预测，第一季度的绕航使得2024年全年集装箱海里增加2%，而这种增加的箱海里集中影响在第一季度，所以对应区间市场变化明显，一旦红海局势得到改善并恢复红海航线，对集装箱运费市场的冲击也是显而易见。总体而言，HiFleet预测2024年集装箱船运输市场应该是冲高回落的市场趋势。

Since the Red Sea became severe in late December 2023, the container shipping market has strengthened rapidly, as the circumnavigation of container ships in the Red Sea and the Gulf of Aden has a significant short-term impact on the supply and demand balance of the industry. Most container ships on the affected east-west routes have chosen the longer alternative route via the Cape of Good Hope, and the average length of container trade has increased by approximately 10% since mid-December, with short-term imbalances in supply and demand leading to sharp increases in freight rates and charter rates. The Shanghai Container Freight Rate Index (SCFI) jumped from an average of about 1,000 points in early December to about 2,200 points in January, with container shipping rates stabilizing in late January and early February.

But because of the disruption to the Red Sea route, some liner companies have suspended discussions on long-term freight contracts for Asia-Europe routes, making it difficult to determine long-term rates. Relative to container freight rates, container leasing levels have been slow to respond, but the trend for container leasing levels throughout January has been upward, with an overall average increase of 20% from December 23.

At the same time as the strong delivery of new container ships, the disruption of the Red Sea route has created a strategic management challenge for the container shipping industry, with container operators replanning routes to the Cape of Good Hope, and increased demand for container ships in the short term absorbing most of the new container capacity in the first quarter of 2024. However, once the situation in the Red Sea eases, it is expected that supply pressure will re-emerge and cause the market to weaken again. The current disruption in the Red Sea market is not as severe as the coronavirus pandemic, which has had a major impact on global supply chains and logistics.

According to hiFleet data, the average speed of container ships in January 2024 has improved significantly, with the industry as a whole increasing by 1% compared to the average speed in 2023, while large container shipping has reached a high of 16 knots, which is 7% higher than the average speed in 2023.

The main driver of the current container transport market is the situation in the Red Sea. According to hiFleet data, the volume of container ship transits through the Suez Canal in late January was down about 80 percent compared to December, with more than 500 ships sailing around the Cape of Good Hope. Looking forward to the future, the current situation in the Red Sea is still unstable, many shipping companies in the first quarter of the sailing around the Cape of Good Hope policy is basically unchanged, based on this forecast, the first quarter of the sailing will make 2024 annual container nautical miles increased by 2%, and this increase in container nautical miles concentrated in the first quarter, so the corresponding range of market changes are obvious. Once the situation in the Red Sea improves and the Red Sea route is resumed, the impact on the container freight market is also obvious. Overall, HiFleet predicts that the container shipping market in 2024 should be a market trend of rising and falling.