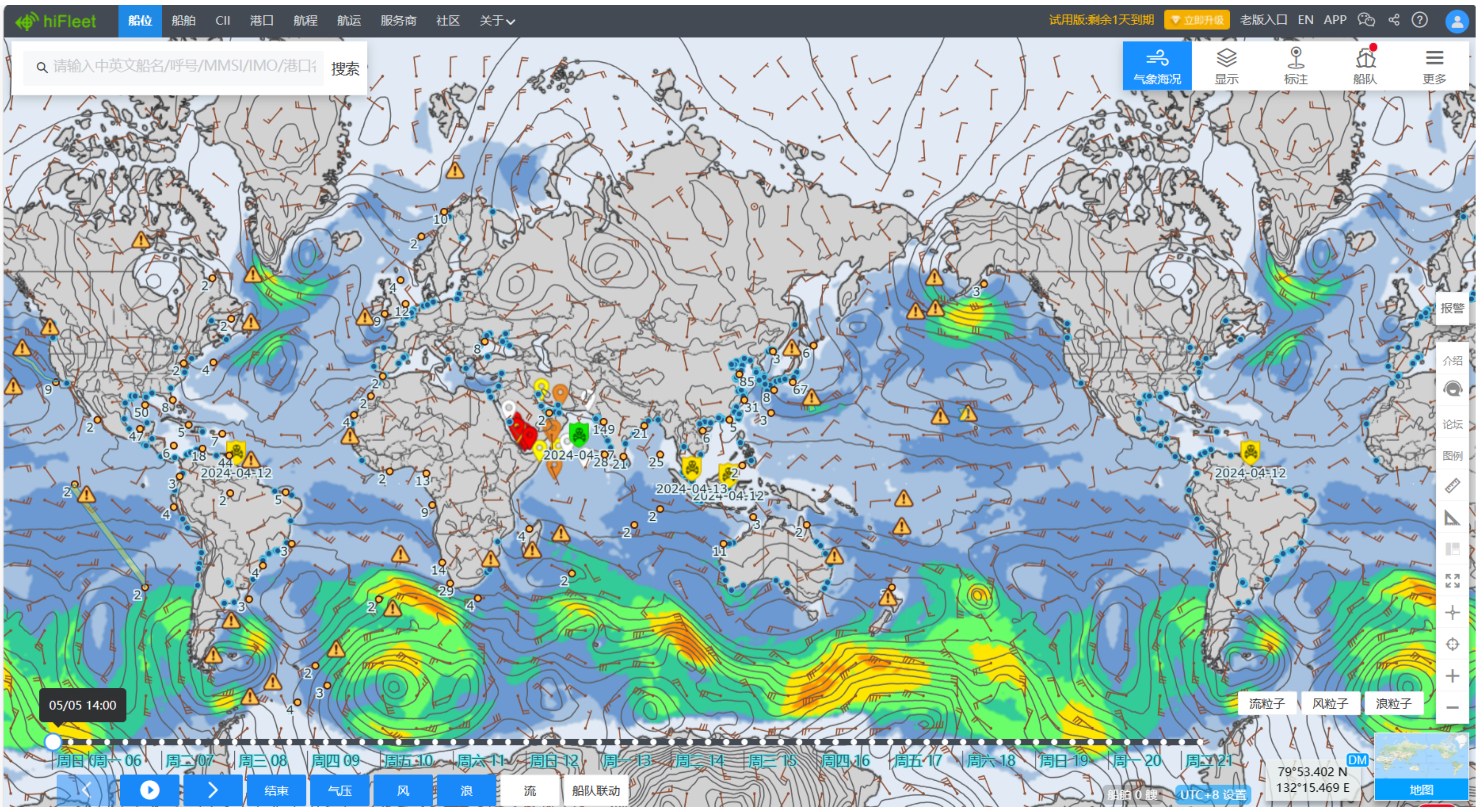
2024年
第18周市场周报

Contents

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896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 896 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

未来一周中国渤海、黄海、东海海域风力维持4-5级，相关海域海浪将从2米中浪到1米轻浪；台湾海峡风力有时5级，台湾海峡洋面海浪将经历2米中浪，南海大部海域风力维持在4-5级，有时中浪。大西洋和太平洋北部区域低压活动明显减少，海域海况逐步改善。 The coming week the wind in Bohai Sea, Yellow Sea and China East Sea stay moderate with the seas from moderate to slight. The wind in the Taiwan Strait might see breeze and the sea in the Taiwan Strait happens to experience rough. In most of the South China Sea the wind stays moderate with moderate sea. Low-pressure in the north of North Atlantic and Pacific Ocean become small, sea conditions are improving.

海盗事件 Piracy

最近有海盗可疑事件报告，4月20号，拉伯海。一艘正在航行的油轮发现一艘可能的母船，有三艘小船(蓝色和绿色船体)。一艘载有四人的船以14节的速度跟随油轮30分钟，但没有看到武器或梯子。Suspicious Incident Report: This incident will not be added to the piracy incident figures. 20.04.2024: 0652 UTC: Psn: 12-45.31N 063-46.22E, Arabian Sea. A tanker underway sighted a possible mother vessel with three small boats (blue and green coloured hull). One boat with four persons followed the tanker at a speed of 14 knots for 30 mins. Weapons or ladders not sighted.

海上事件 Marine Incidents

两艘Sinokor Merchant Marine的超大型油轮在欧洲被扣留，原因是未能通过港口国的检查。根据hiFleet的PSC数据，这两艘船分别是悬挂马绍尔国旗的316,400载重吨'Gulf Loyalty'(2011年建造)和314,000载重吨'North Loyalty'(2012年建造)。Two Sinokor Merchant Marine very large tankers have been detained in Europe after failing to pass port state inspections. According to hiFleet's PSC data, the two vessels are the Marshall Islands-flagged 316,400 DWT 'Gulf Loyalty' (built in 2011) and 314,000 DWT 'North Loyalty' (built in 2012).

其它 Others

没有 Nil

备注 Remark

本报告数据截止时间为2024年5月5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 May 5 of 2024; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

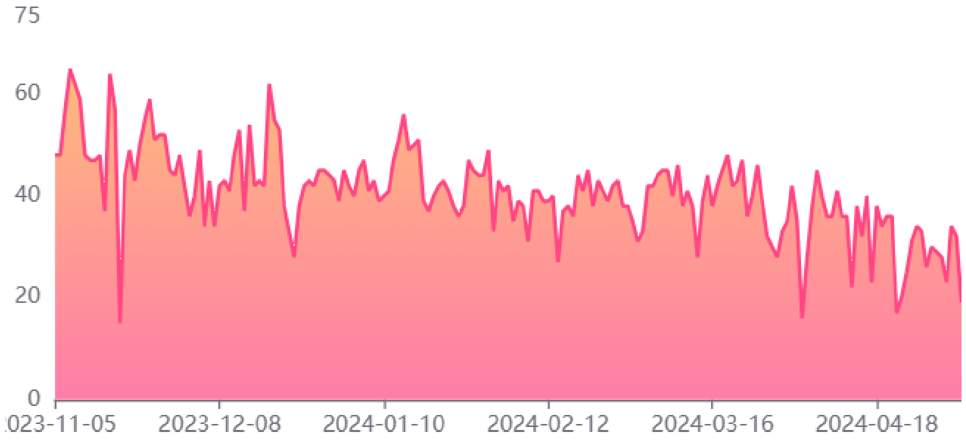
第二部分 航运数据 SHIPPING DATA

最近一周船舶运河/河口锚地等待数量

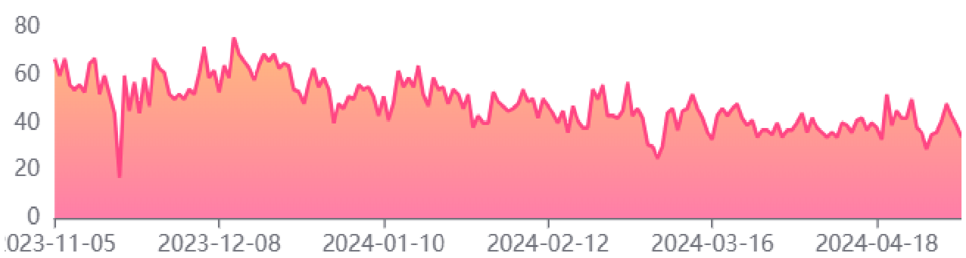
Latest Week Update Vessel Waiting Numbers Information in Anchorages of Canals and Rivers

Canal/Riv.	P.N.	M.N.	WoW	MoM
Suez.Red	34	1135	-16	-40
Miss.Riv.	4	101	-4	0
CJK	157	5412	268	131
Pa.Atlan.	56	1382	43	25
Colum.Riv.	5	151	7	-19
Suez.Med.	19	905	-1	-191
Pa.Pac.	54	1408	-31	23
ZJK	89	2739	-130	367

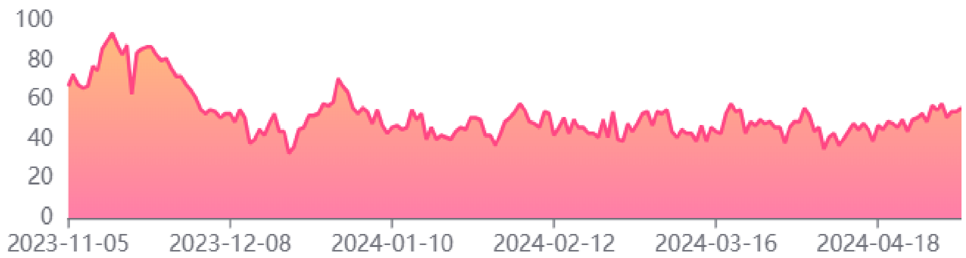
Suez(Mediterranean-Red Sea)



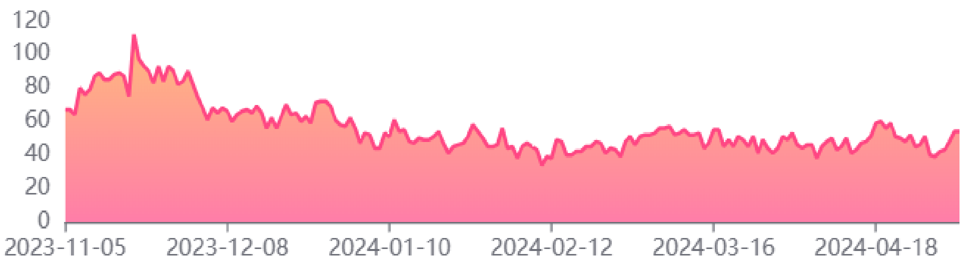
Suez(Red Sea-Mediterranean)



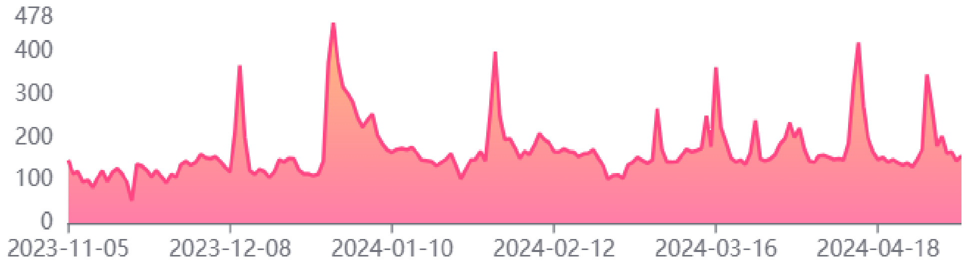
Panama(Atlantic-Pacific)



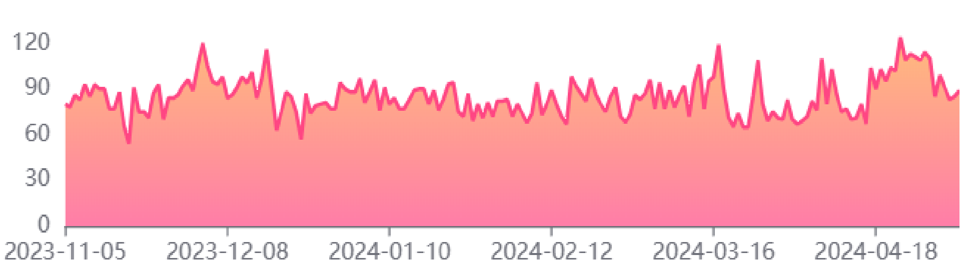
Panama(Pacific-Atlantic)



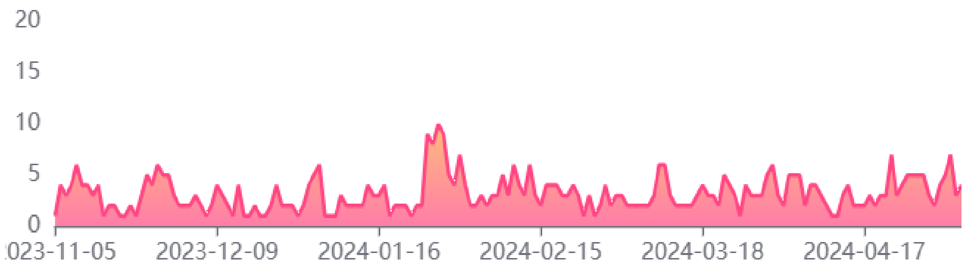
Changjiangkou(Estuary)



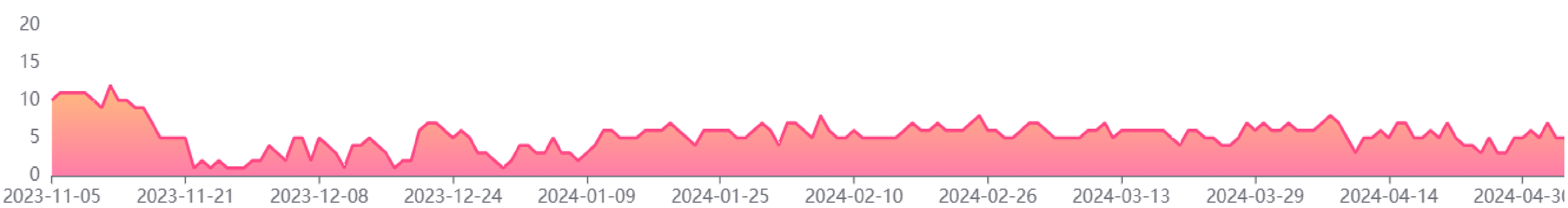
Zhujiangkou(Estuary)



Mississippi River(Estuary)



Columbia River(Estuary)

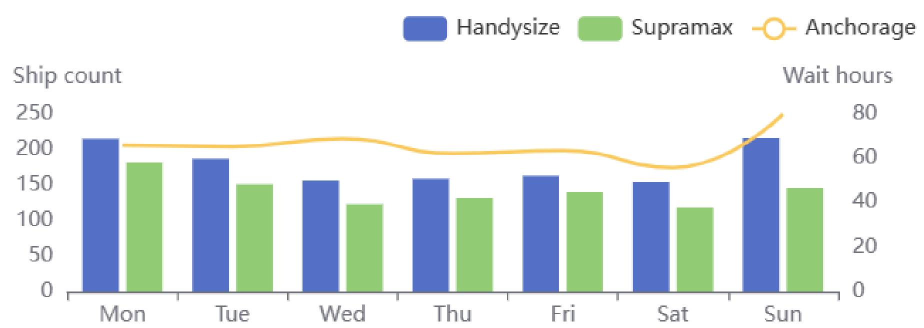


(P.N-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

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

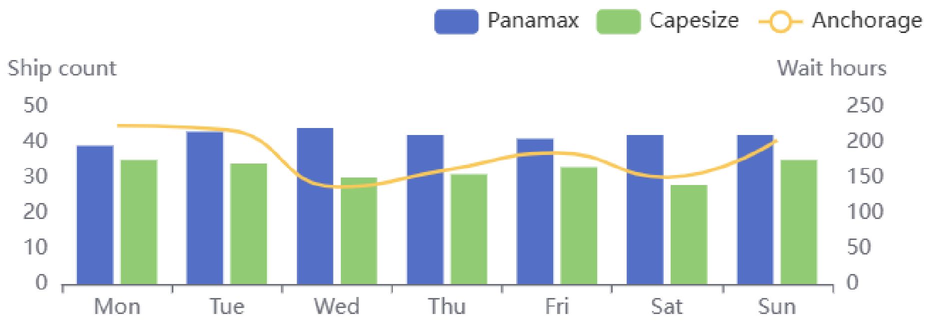
Type	M	T	W	Th	F	Sat	Sun
HDY	215	187	156	159	163	154	216
SMX	182	151	123	132	140	118	146
WT.h.	65.9	65.3	68.8	62.2	63.5	55.9	80



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

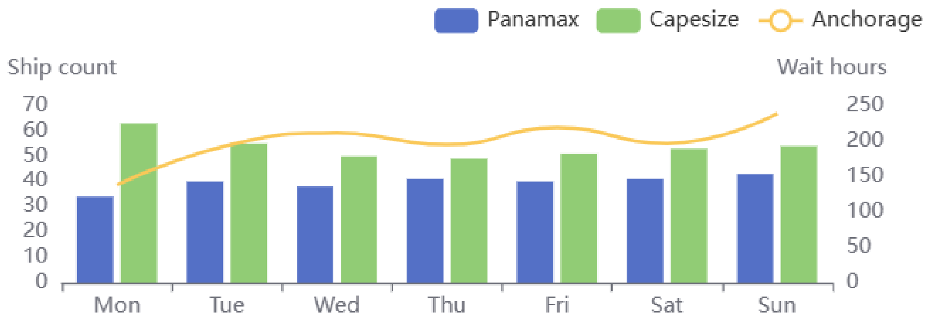
Type	M	T	W	Th	F	Sat	Sun
Pan.	39	43	44	42	41	42	42
Cap	35	34	30	31	33	28	35
WT.h.	223.75	217.6	137	161	185	150.7	203



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

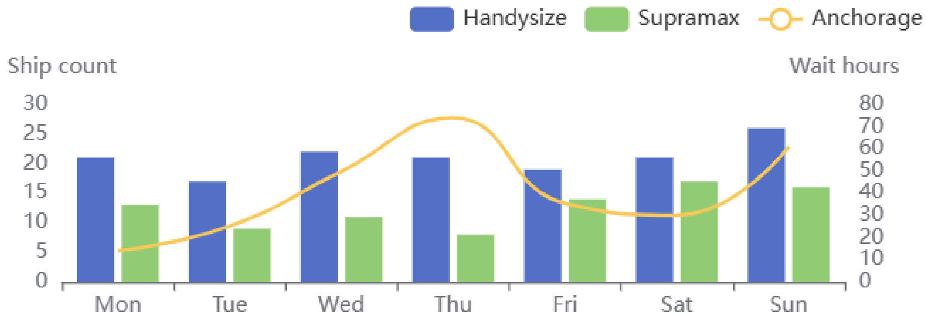
Type	M	T	W	Th	F	Sat	Sun
Pan.	34	40	38	41	40	41	43
Cap	63	55	50	49	51	53	54
WT.h.	138	193.5	211.3	194.8	218.8	196.6	239



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

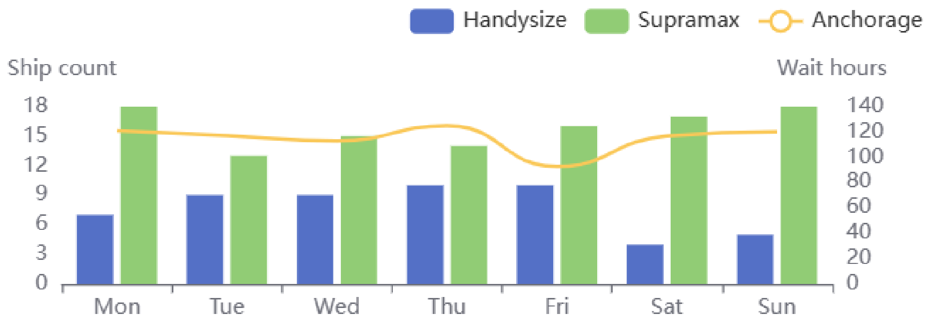
Type	M	T	W	Th	F	Sat	Sun
HDY	21	17	22	21	19	21	26
SMX	13	9	11	8	14	17	16
WT.h.	14.1	25.2	49.9	73.9	35.4	30.1	61



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

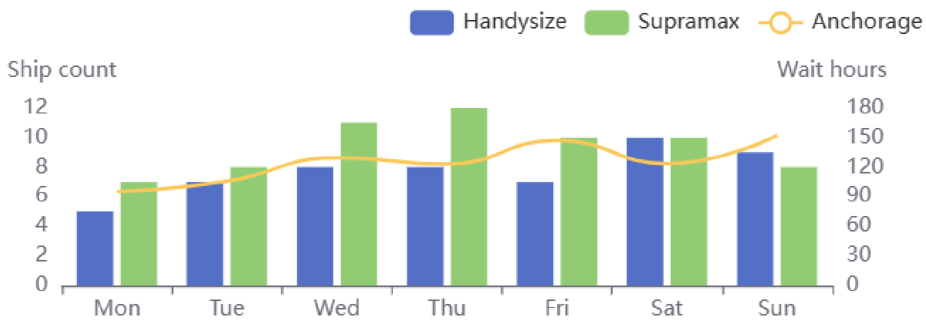
Type	M	T	W	Th	F	Sat	Sun
HDY	7	9	9	10	10	4	5
SMX	18	13	15	14	16	17	18
WT.h.	121	116.95	112.9	124.9	92.7	116.7	120



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

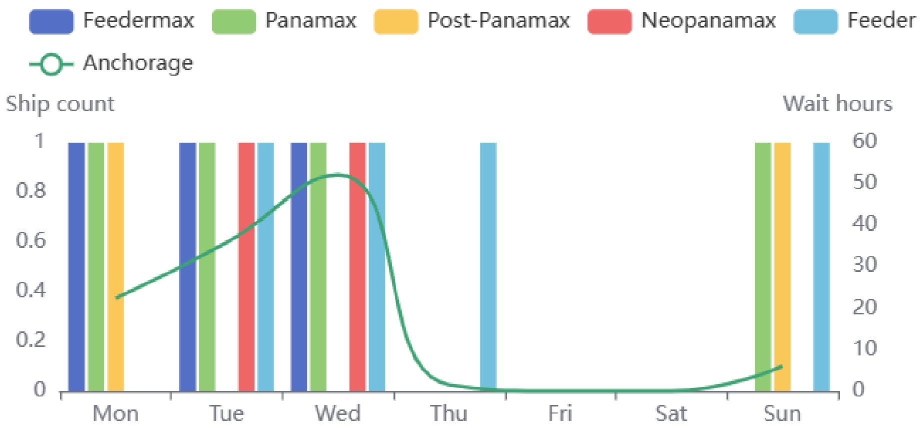
Type	M	T	W	Th	F	Sat	Sun
HDY	5	7	8	8	7	10	9
SMX	7	8	11	12	10	10	8
WT.h.	94.95	105.7	129.7	123.2	147.2	123.6	152



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

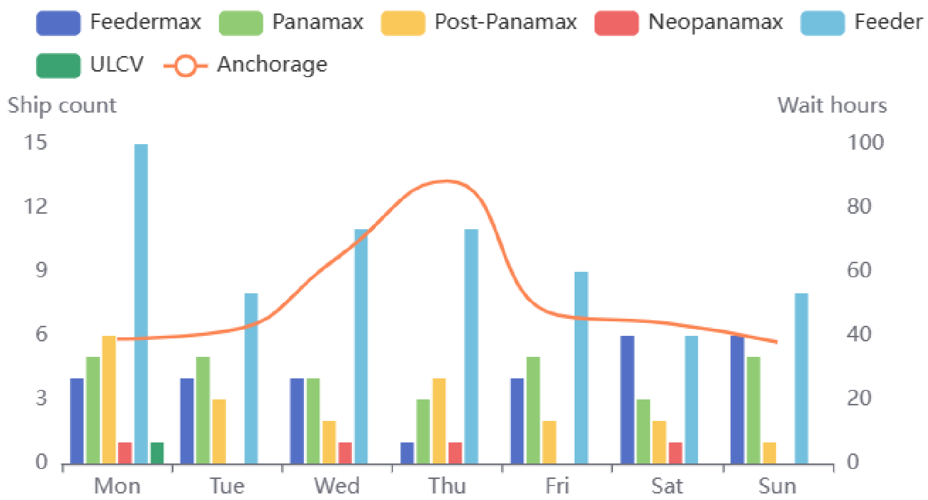
Type	M	T	W	Th	F	Sat	Sun
F.ma.	1	1	1	0	0	0	0
Pan.	1	1	1	0	0	0	1
PPx	1	0	0	0	0	0	1
NPx	0	1	1	0	0	0	0
Fd	0	1	1	1	0	0	1
WT.h.	22.4	35.85	52.2	1.5	0.0	0.0	6
Ulcv	0	0	0	0	0	0	0



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

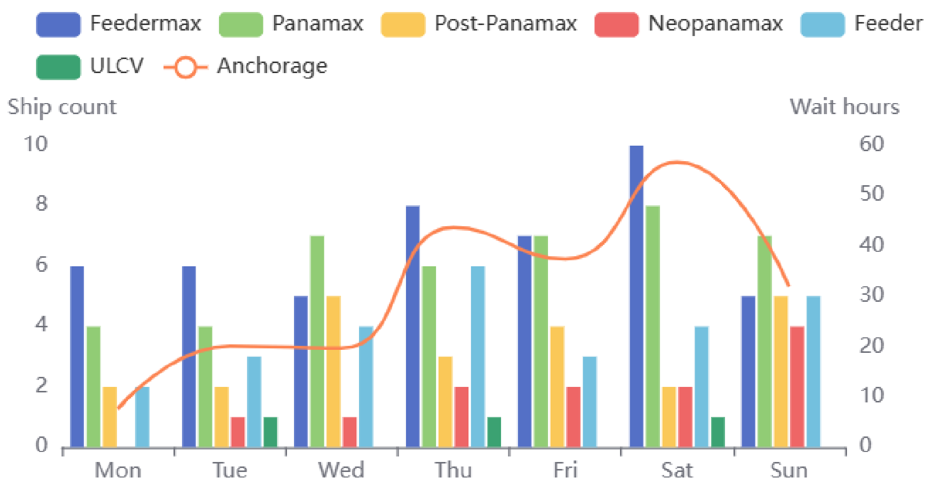
Type	M	T	W	Th	F	Sat	Sun
F.ma.	4	4	4	1	4	6	6
Pan.	5	5	4	3	5	3	5
PPx	6	3	2	4	2	2	1
NPx	1	0	1	1	0	1	0
Fd	15	8	11	11	9	6	8
Ulcv	1	0	0	0	0	0	0
WT.h.	39	41.4	64.4	88.4	46.45	43.9	38



最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

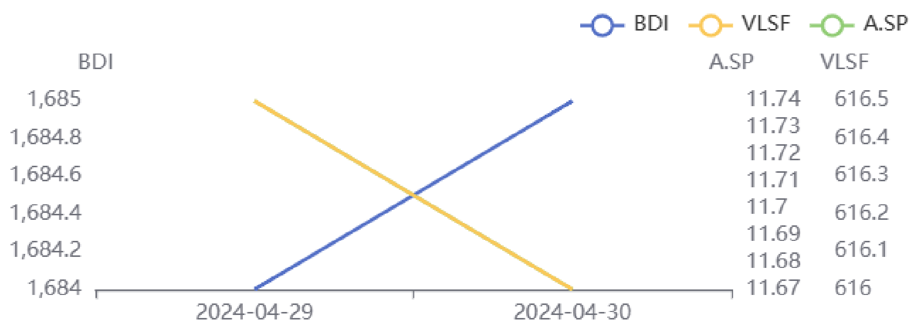
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

Type	M	T	W	Th	F	Sat	Sun
F.ma.	6	6	5	8	7	10	5
Pan.	4	4	7	6	7	8	7
PPx	2	2	5	3	4	2	5
NPx	0	1	1	2	2	2	4
Fd	2	3	4	6	3	4	5
Ulcv	0	1	0	1	0	1	0
WT.h.	7.6	20.1	19.7	43.7	37.4	56.7	32



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

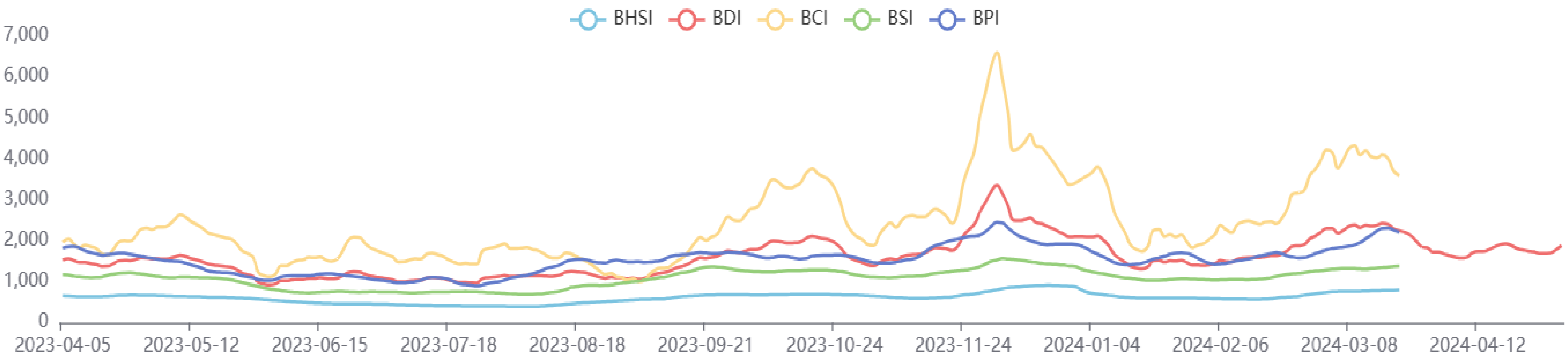
Type	M	T	W	Th	F	Sat	Sun
BDI	1858	1845	1847				
VLSF	616.50	616.00					
A.SP	11.74	11.67	11.76	11.85	11.86	11.85	



第三部分 航运市场 SHIPPING MARKET

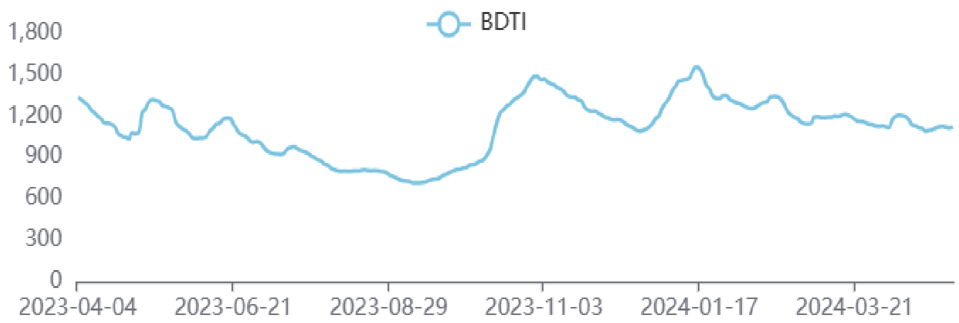
波罗的海干散货指数Baltic Dry Index

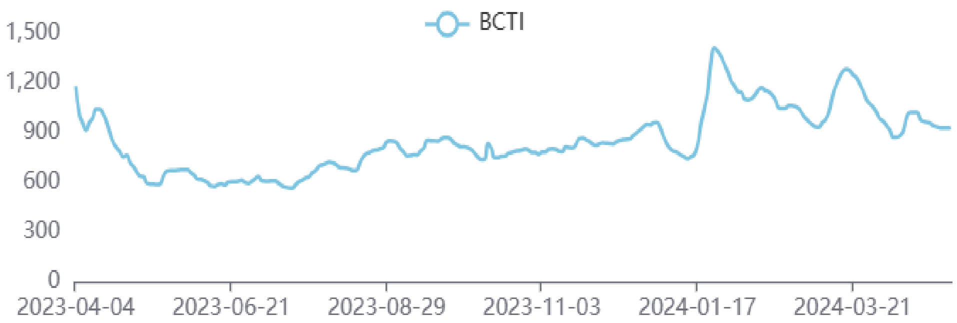
Type	PI	WoW	W%	M%	y%
BDI	795	18.0	2.32	28.64	Infinity
BCI	1876	155.0	9.01	15.23	20.41
BPI	1994	79.0	4.13	5.22	Infinity
BSI	729	-22.0	-2.93	-0.82	Infinity
BHSI	6181	721.0	13.21	14.85	Infinity

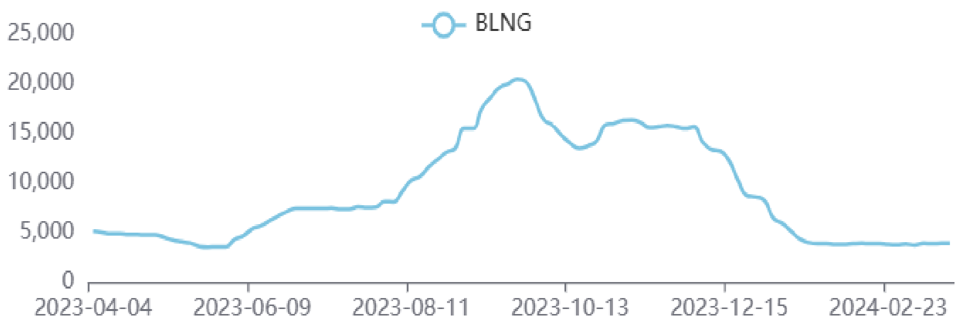


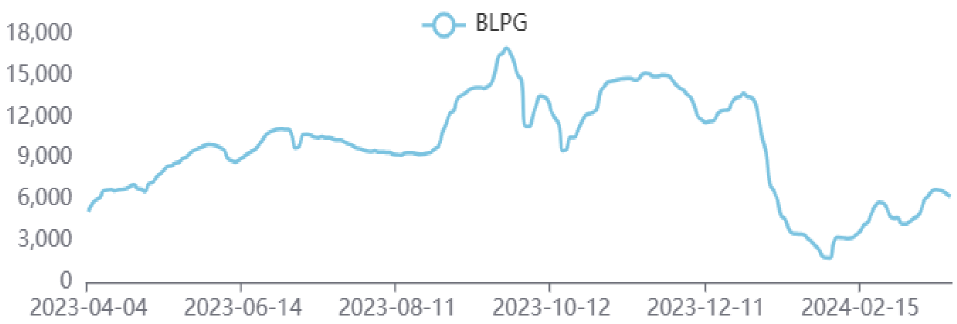
能源运价指数Energy Shipping Index

Type	PI	WoW	W%	M%	y%
BDTI	1458	-37.0	-2.47	15.62	Infinity
BCTI	1122	10.0	0.9	0.0	4.66
BLNG	2073	-8.0	-0.38	0.0	Infinity
BLPG	2863	458.0	19.04	16.19	Infinity

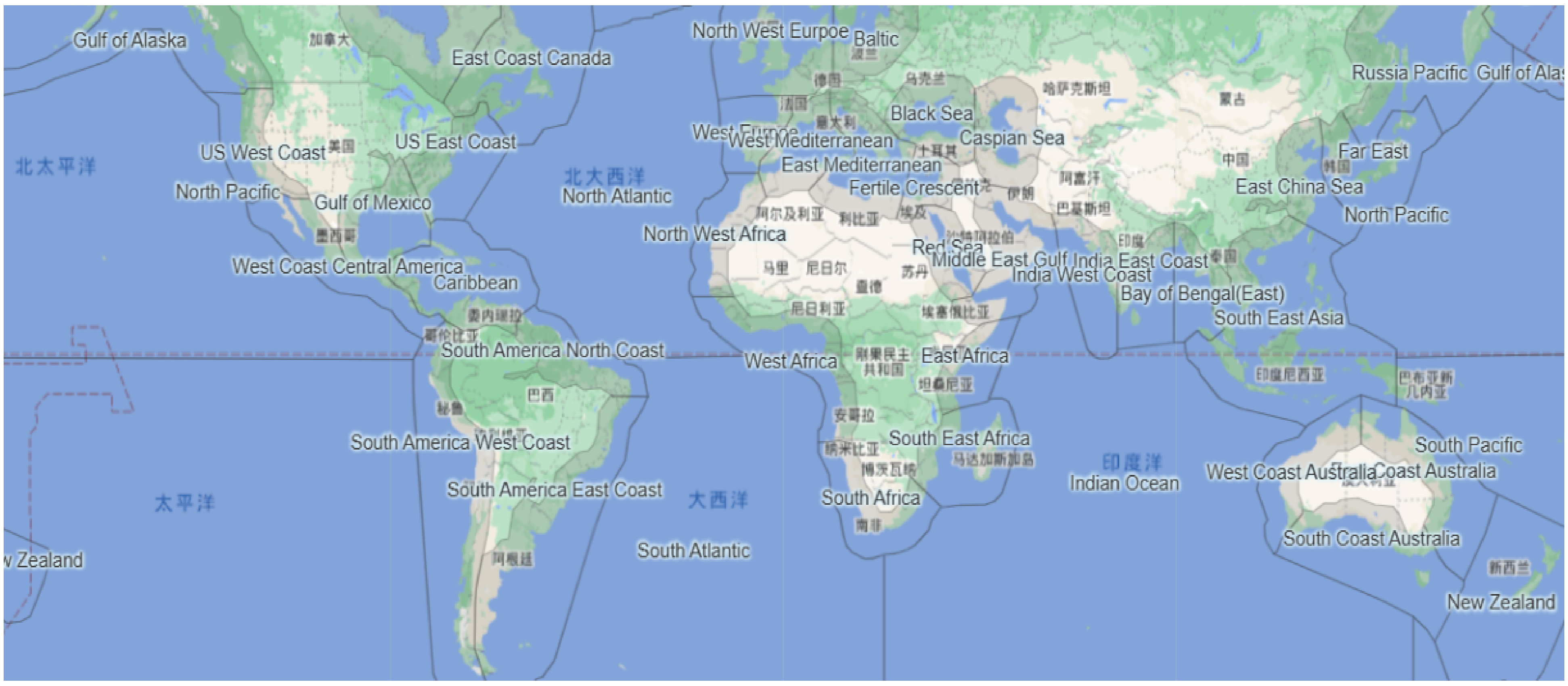








第四部分 运力分布 SUPPLY DISTRIBUTION

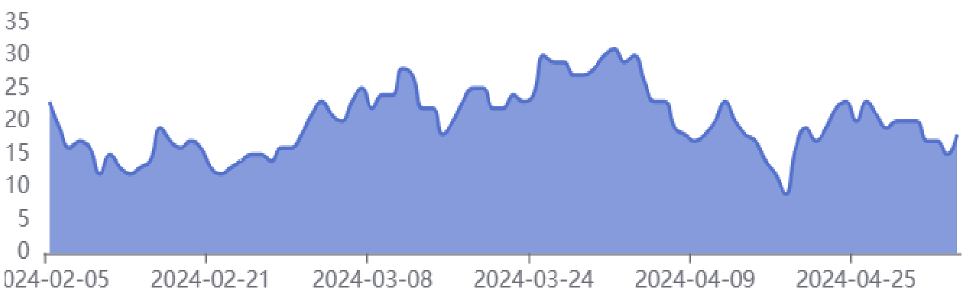


好望角型散货船 Capesize

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.

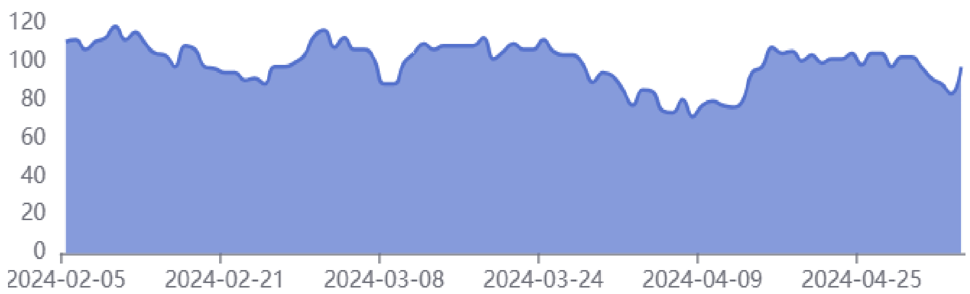
Type	M	T	W	Th	F	Sat	Sun
Cape	20	20	20	17	17	15	18



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.

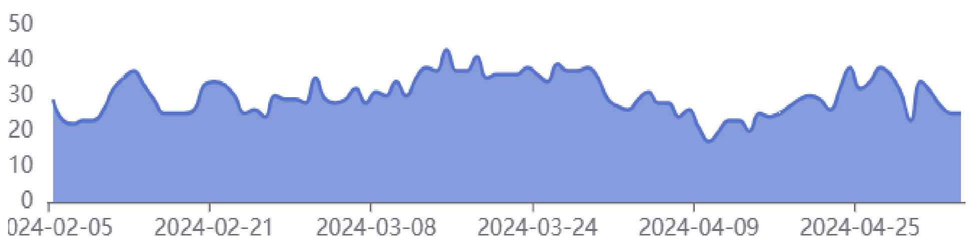
Type	M	T	W	Th	F	Sat	Sun
Cape	102	102	97	91	88	83	97



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	31	23	34	31	27	25	25

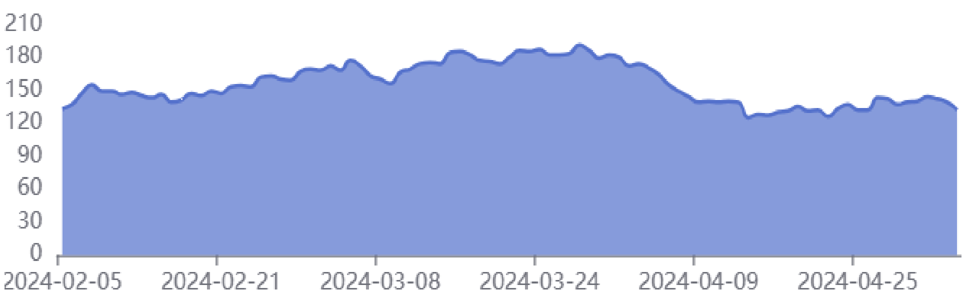


巴拿马型散货船 PANAMAX

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.

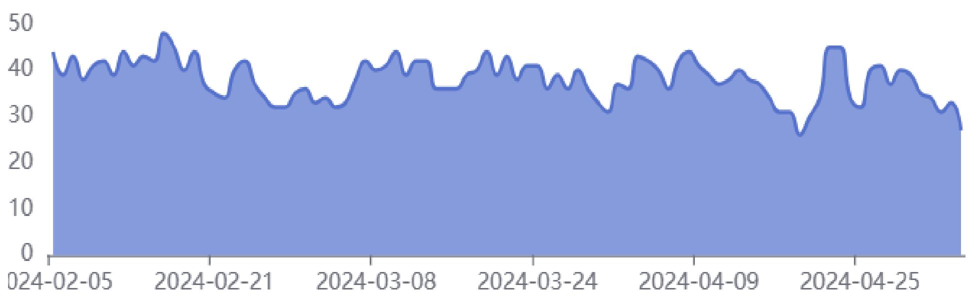
Type	M	T	W	Th	F	Sat	Sun
Pan.	137	139	140	144	142	139	132



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.

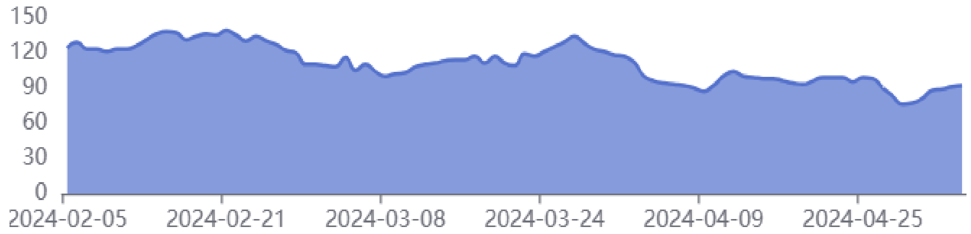
Type	M	T	W	Th	F	Sat	Sun
Pan.	34	33	30	27	31	30	29



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.	76	77	81	88	89	91	92

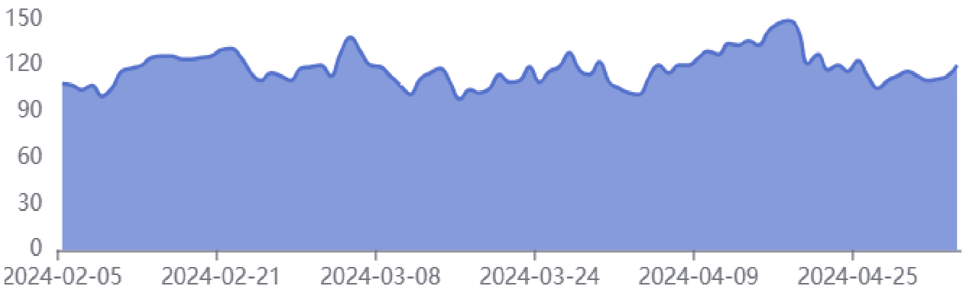


超大灵便型散货 SUPRAMAX

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.

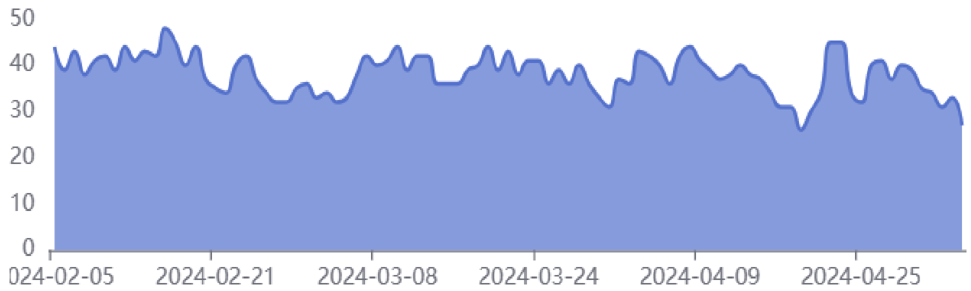
Type	M	T	W	Th	F	Sat	Sun
SMX	113	116	113	110	111	113	120



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.

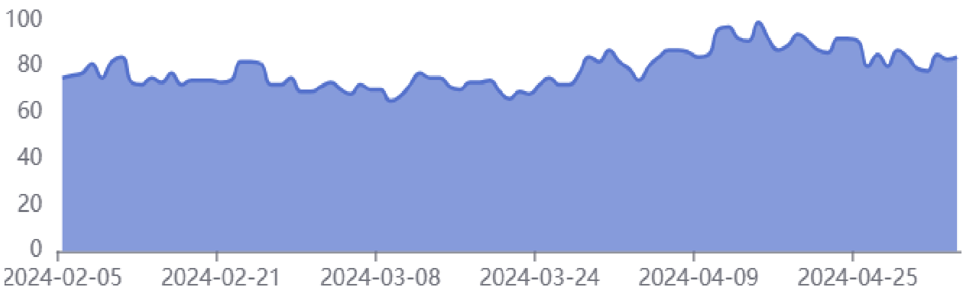
Type	M	T	W	Th	F	Sat	Sun
SMX	40	39	35	34	31	33	27



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.

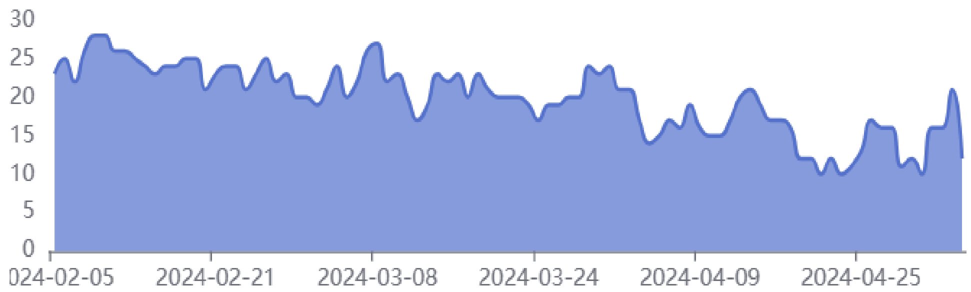
Type	M	T	W	Th	F	Sat	Sun
SMX	11	12	10	16	16	21	12



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.

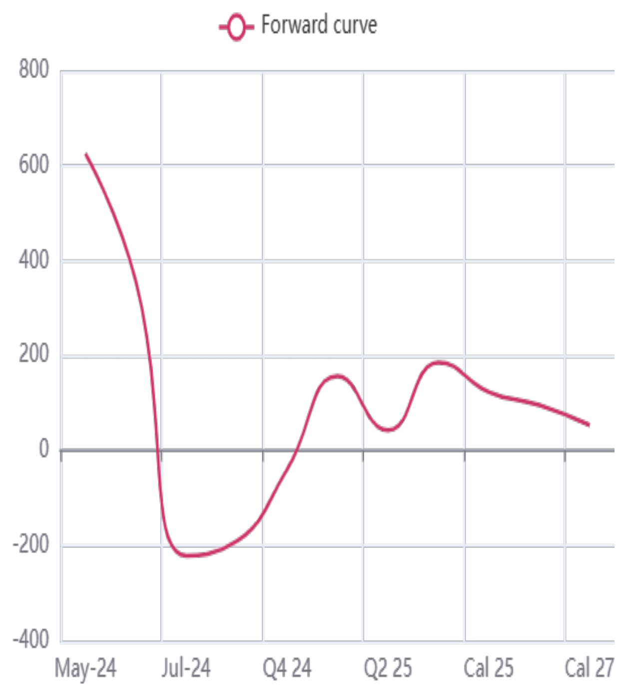
Type	M	T	W	Th	F	Sat	Sun
SMX	87	84	79	78	85	83	84



第五部分 远期运价协议 FFA

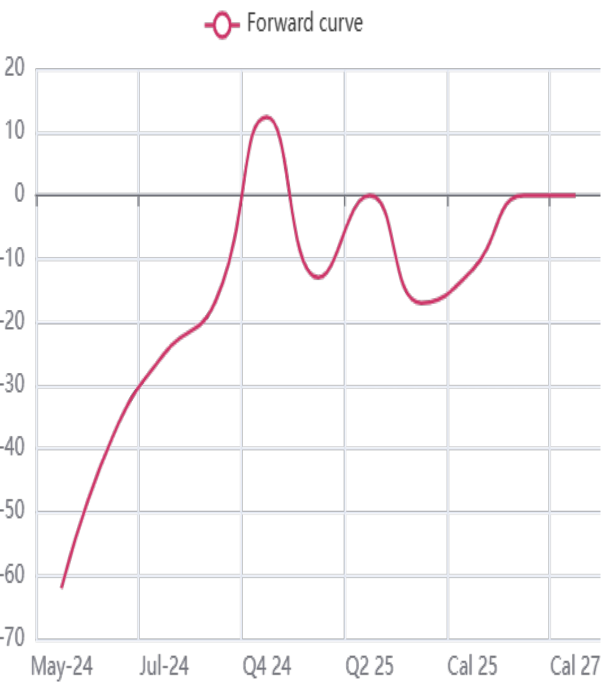
好望角型散货船Capesize

5TC	$/day	WoW	
May-24	26,575.00	625.0	2.4 %
Jun-24	30,232.00	357.0	1.2 %
Jul-24	28,743.00	-221.0	-0.8 %
Q3 24	28,164.33	-190.33	-0.7 %
Q4 24	27,761.00	-39.0	-0.1 %
Q1 25	16,557.00	157.0	1.0 %
Q2 25	21,600.00	43.0	0.2 %
Q3 25	24,357.00	186.0	0.8 %
Cal 25	21,710.75	123.5	0.6 %
Cal 26	20,700.00	96.0	0.5 %
Cal 27	19,525.00	54.0	0.3 %



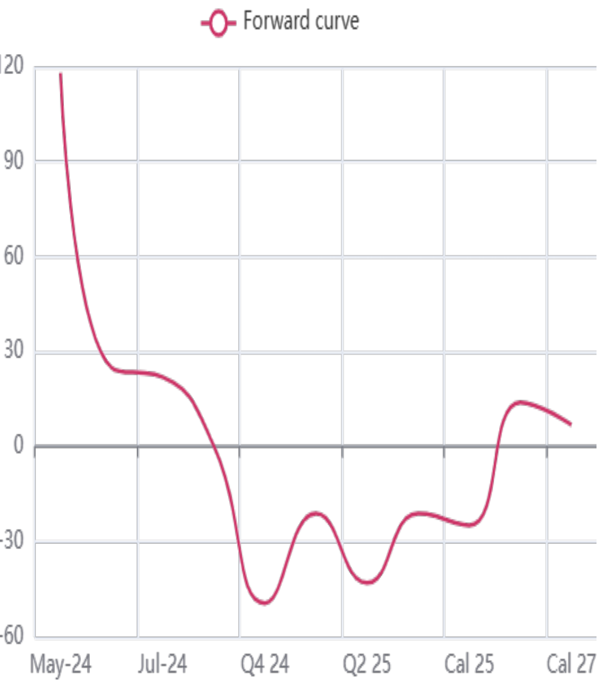
灵便型散货船Handysize

7TC	$/day	WoW	
May-24	13,588.00	-62.0	-0.5 %
Jun-24	13,825.00	-38.0	-0.3 %
Jul-24	13,750.00	-25.0	-0.2 %
Q3 24	13,625.33	-16.67	-0.1 %
Q4 24	13,162.67	12.33	0.1 %
Q1 25	11,000.00	-13.0	-0.1 %
Q2 25	12,213.00	0.0	0.0
Q3 25	12,370.00	-17.0	-0.1 %
Cal 25	11,988.25	-11.75	-0.1 %
Cal 26	11,688.00	0.0	0.0 %
Cal 27	11,500.00	0.0	0.0 %



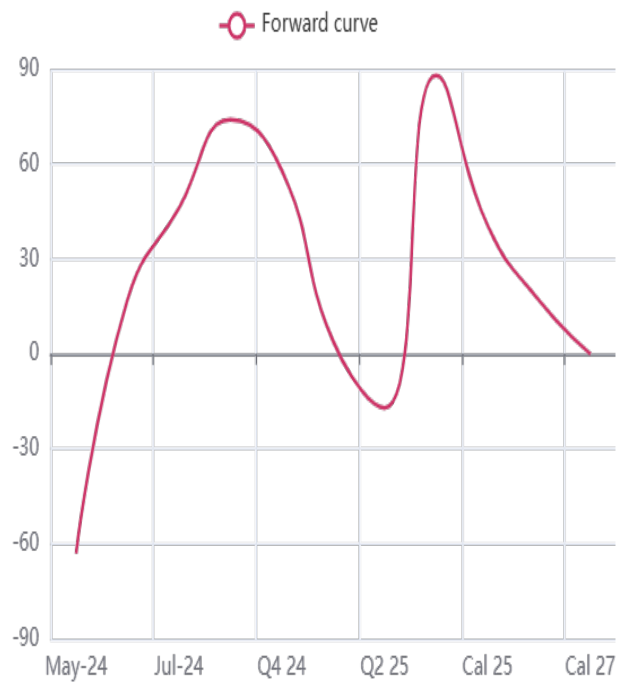
巴拿马型散货船Panamax

4TC	$/day	WoW	
May-24	16,557.00	118.0	0.7 %
Jun-24	16,936.00	25.0	0.1 %
Jul-24	16,711.00	22.0	0.1 %
Q3 24	16,441.67	0.33	0.0 %
Q4 24	15,407.33	-49.33	-0.3 %
Q1 25	12,750.00	-21.0	-0.2 %
Q2 25	14,107.00	-43.0	-0.3 %
Q3 25	13,900.00	-21.0	-0.2 %
Cal 25	13,562.50	-24.75	-0.2 %
Cal 26	12,807.00	14.0	0.1 %
Cal 27	12,400.00	7.0	0.1 %



超大灵便型散货船Supramax

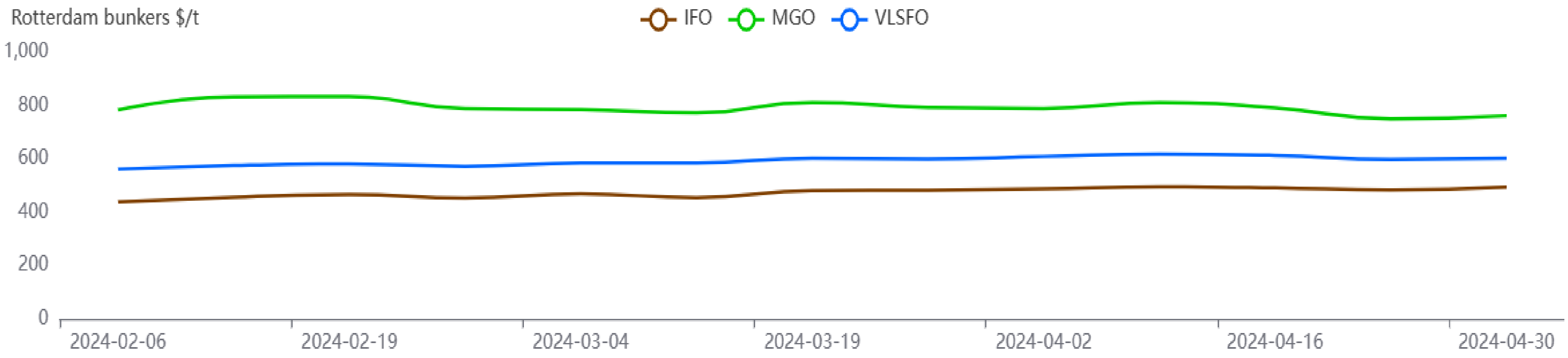
10TC	$/day	WoW	
May-24	15,954.00	-63.0	-0.4 %
Jun-24	16,017.00	17.0	0.1 %
Jul-24	15,696.00	46.0	0.3 %
Q3 24	15,460.00	74.0	0.5 %
Q4 24	14,621.00	58.0	0.4 %
Q1 25	11,979.00	4.0	0.0 %
Q2 25	13,308.00	-17.0	-0.1 %
Q3 25	13,472.00	88.0	0.7 %
13,057.75	Cal 25	40.75	0.3 %
Cal 26	12,296.00	17.0	0.1 %
Cal 27	12,067.00	0.0	0.0 %

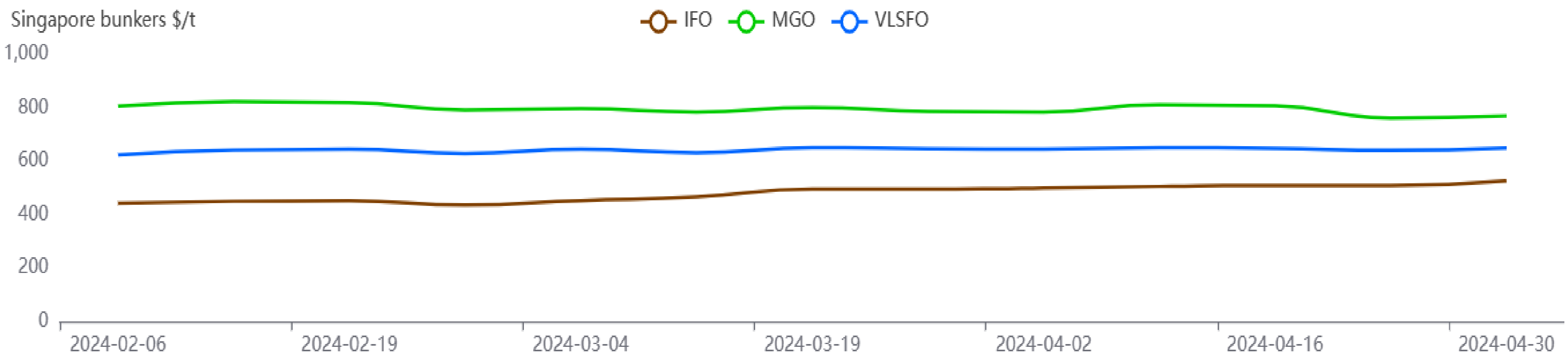


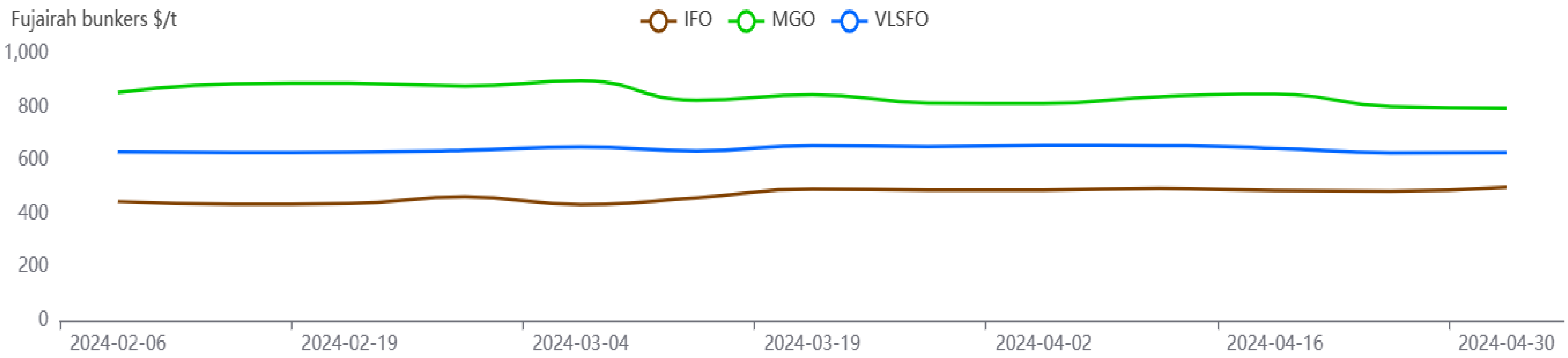
第六部分 燃油价格 BUNKER PRICE

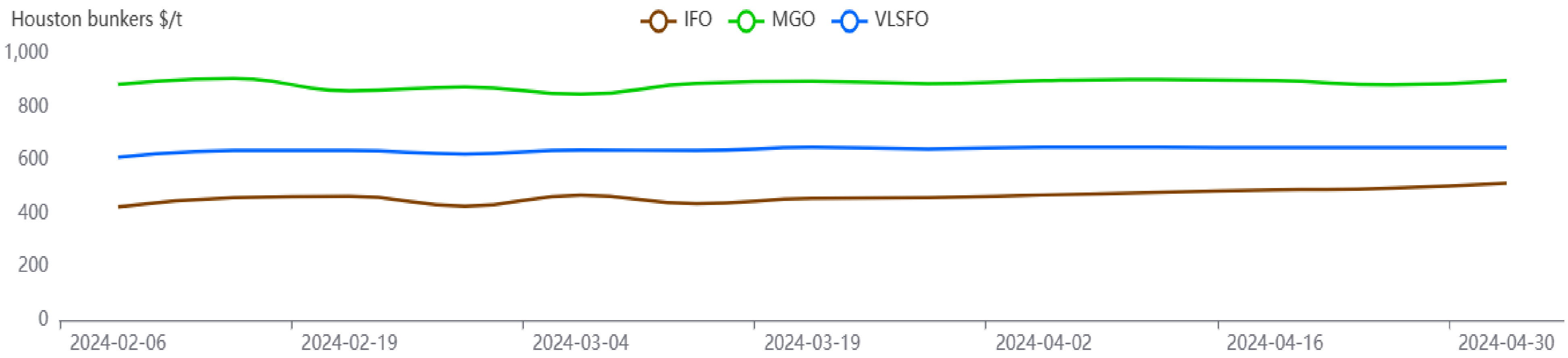
MP	LO	HO	MO	SP	WoW	W%	M%
zhoushan	653.5	531.0	817.5	122.5	-11.0	-8.24	-18.6
Singapore	649.0	527.0	770.0	122.0	-10.0	-7.58	-16.15
Rotterdam	602.5	494.5	762.0	108.0	-6.5	-5.68	-11.48
Fujairah	630.5	500.5	796.5	130.0	-13.5	-9.41	-22.85
Houston	648.5	515.0	900.0	133.5	-18.5	-12.17	-25.63

(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	210.0		11.0	5.53	5.53	-16.22
Maize	206.0		3.0	1.48	4.04	-26.43
Soybeans	221.0		3.0	1.38	-1.78	-18.69
Rice	246.0		0.0	0.0	-1.99	22.03
Barley	213.0		5.0	2.4	2.9	-19.25
Energy		Index	+/-	Weekly	Monthly	YTD
Crude Oil	USD/Bbl	83.1	2.27	2.81	1.3	7.31
Brent	USD/Bbl	88.53	2.61	3.04	2.02	9.28
Natural Gas	USD/MMBtu	1.96	0.22	12.64	7.69	-11.31
Gasoline	USD/Gal	2.75	0.07	2.61	0.0	6.59
Heating Oil	USD/Gal	2.54	0.03	1.2	-4.87	2.42
Ethanol	USD/Gal	1.71	0.03	1.79	7.55	-29.34
Naphtha	USD/T	689.26	4.41	0.64	-3.06	1.35
Propane	USD/Gal	0.81	0.0	0.0	-1.22	-1.22
Uranium	USD/Lbs	87.35	-1.95	-2.18	2.76	71.27
Methanol	CNY/T	2547.0	-70.0	-2.67	1.03	3.37
TTF Gas	EUR/MWh	28.39	-1.52	-5.08	1.94	-29.34
UK Gas	GBp/thm	70.18	-4.67	-6.24	-1.98	-27.35
Industrial		Index	+/-	Weekly	Monthly	YTD
Copper	USD/Lbs	4.59	0.09	2.0	14.75	15.04
Coal	USD/T	134.5	-7.25	-5.11	4.3	-29.36
Steel	CNY/T	3543.0	-51.0	-1.42	-0.17	-5.37
Iron Ore	USD/T	110.16	1.91	1.76	-0.31	-5.03
Aluminum	USD/T	2564.5	-103.0	-3.86	10.3	7.68
Lithium	CNY/T	110500.0	0.0	0.0	N/A	N/A
Metals		Index	+/-	Weekly	Monthly	YTD
Gold	USD/t.oz	2334.9	-21.3	-0.9	7.1	17.76
Silver	USD/t.oz	27.2	-0.5	-1.81	10.57	8.89
Platium	USD/t.oz	927.9	-9.8	-1.05	2.72	-15.44
Currencies	Index		+/-	Weekly	Monthly	YTD
EUR/USD	1.07		0.0	0.0	-0.93	-2.73
USD/CNY	7.26		0.01	0.14	0.14	5.22

第八部分 本周话题 WEEKLY TOPIC

2024海上石油运输将持续强劲

2023年全年海上油品运输总量超过30亿8千万吨，相比2022年的30亿2千万吨增加了2%，然而2023年海上油品运输的吨海里相比2022年增加了6.2%，主要原因来自于俄罗斯原油运输路线大大拉长了，这归因于从波罗的海到亚洲的原油贸易新格局；同时红海局势的扰动中断了大部分船舶原有的航路，绕航好望角也明显增加了航路，这也是重要的贡献因素；同年因为巴拿马运河干旱也使得这种船型大排长队；这些使得市场对油轮的需求显得格外紧张，使得油轮市场运价持续高位运行，去年油轮船东赚的盆满钵满。

2024年以来，刚刚过去的第一个季度，国际油轮市场各船型运价继续走势强劲。VLCC运价因今年3月货盘集中释放，加之中东区域船位阶段性紧张，运价一度被推涨至近7万美元每天的水平，且回调后运价仍能稳定在4万美元每天水平以上。2024年1到3月，VLCC TD3C（中东至中国航线）平均日收益相比上一个季度增加了12%。针对中小型油轮，其市场水平持续受益于地缘政治冲突带来的贸易变动，运价一直维持在高景气区间。与此同时，红海区域因为胡塞武装的纠缠和导弹袭击的紧张局势使大部分原先经过苏伊士运河的油轮绕行好望角，大大增加了中小型油轮的吨海里需求。 在油轮细分中成品油轮受影响程度要大于原油轮，中东至日本航线的LR2型成品油轮平均日收益一度突破10万美元每天。 根据hiFleet数据，2024年1到3月，全球VLCC共交付1艘，拆解1艘，新造船订单获得24艘，2024 年仅剩余1艘VLCC油轮等待交付。

以上分析可预见2024年油轮运输市场大概率将维持高位运行态势，油轮船东大概还将继续享受鼓舞人心的收益。

The total volume of seaborn oil transported in 2023 exceeded 3.08 billion tons, an increase of 2% compared to 3.02 billion tons in 2022, however, the volume of oil tonne-miles transported in 2023 increased by 6.2% compared to 2022, mainly due to the obviously lengthened oil transportation routes out of Russia, which is attributed to the new pattern of crude oil trade from the Baltic Sea to Asia; At the same time, the disturbance of the situation in the Red Sea interrupted the original route of most ships, and the navigation around the Cape of Good Hope also significantly increased the route, which is also an important contributing factor. Drought in the Panama Canal that same year also caused long lines of this type of ship; These made the market demand for oil tankers appear particularly tight, making the tanker market continue to run at high rates, and tanker owners made a pot of money last year.

Since 2024, in the first quarter just passed, the freight rates of various ship types in the international tanker market continued to trend strongly. VLCC freight rates due to the concentrated release of the pallet in March this year, coupled with the phased tension in the Middle East region, freight rates were once pushed up to the level of nearly $70,000 per day, and after the correction, freight rates can still be stable at more than $40,000 per day. From January to March 2024, VLCC TD3C (Middle East to China route) average daily revenue increased by 12% compared to the previous quarter. For small and medium-sized tankers, the market level continues to benefit from the trade movement caused by geopolitical conflicts, and freight rates have remained in the high boom range. At the same time, tensions in the Red Sea region due to Houthi entanglements and missile attacks have diverted most oil tankers that previously passed through the Suez Canal around the Cape of Good Hope, greatly increasing the tonne-nautical mile demand for small and medium-sized oil tankers. In the oil tanker segment, the product tanker is more affected than the crude oil tanker, and the average daily income of the LR2 type of product tanker on the Middle East to Japan route once exceeded $100,000 per day. According to hiFleet data, from January to March 2024, a total of one VLCC was delivered worldwide, one was dismantled, 24 new shipbuilding orders were placed, and only one VLCC tanker remains to be delivered in 2024.

The above analysis predicts that the tanker shipping market will maintain a high probability of operation in 2024, and tanker owners will probably continue to enjoy encouraging returns.