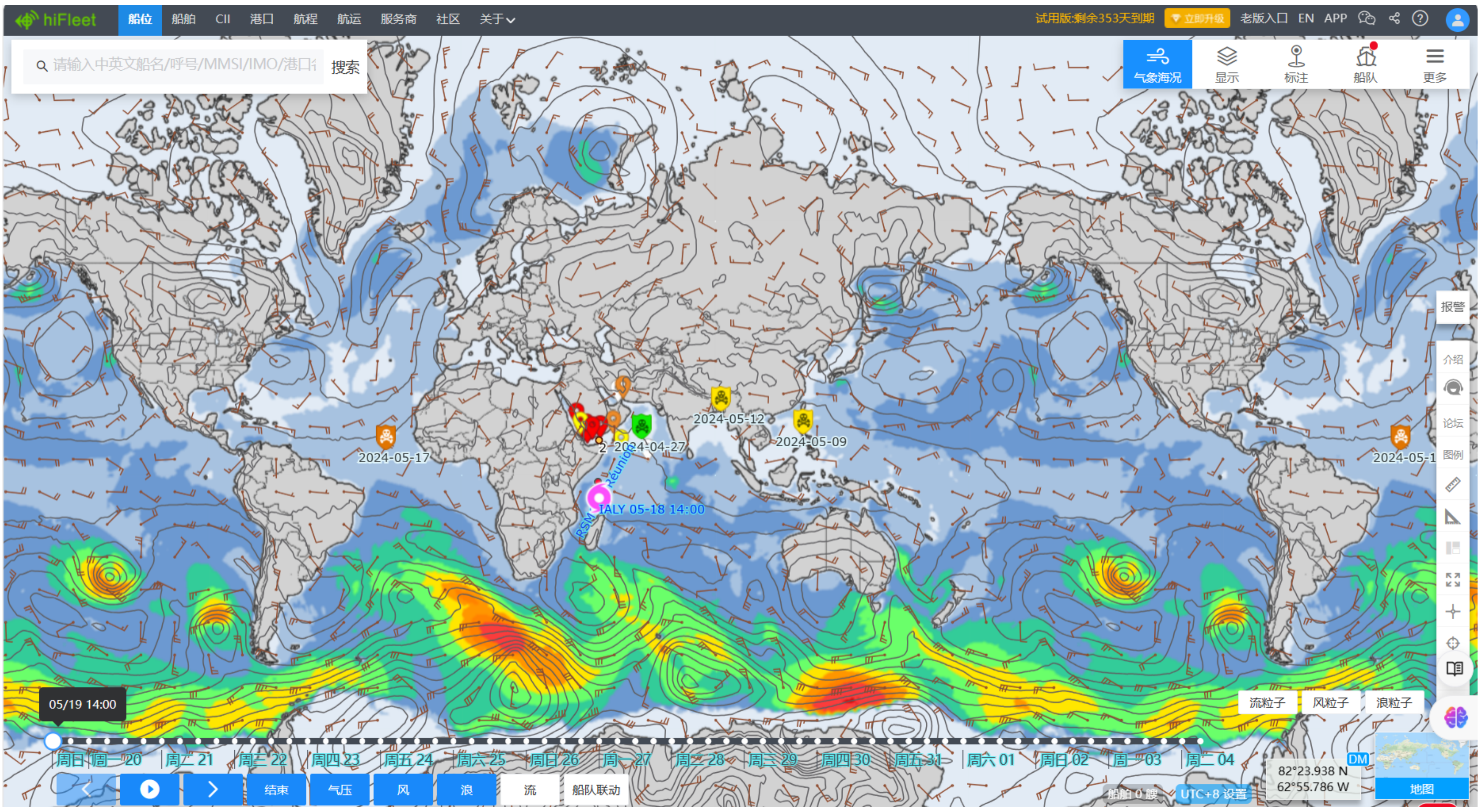
2024年
第20周市场周报

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827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 827 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、东海海域风力从6-7减弱到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6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，轻浪。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 are becoming weak from breeze to moderate with the seas from moderate to slight. The wind in the Taiwan Strait might see breeze and the sea there happens to experience moderate. 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 quiet, sea conditions are good.

海盗事件 Piracy

5月17号在佛得角新布拉瓦以南约363海里处，十名持AK-47的海盗登上一艘正在航行的油化船并控制了驾驶台。所有船员被召集到驾驶台，海盗绑住了他们的手和脚。海盗命令大管轮和四管轮停止引擎，让船漂流，意图盗取货物和燃油。海盗偷走了船员和船上的财物。然后他们把所有船员转移到了舵机房，并告诉船员所有门上都设置了爆炸装置，船员只能在两个小时后才能离开。当船员从舵机房出来时，没有发现海盗或爆炸物。海盗在逃跑前损坏了通讯、互联网、导航设备以及主机和缸油流阀的空气控制管道。船员设法将船驶往下一个港口，没有货物或燃油被盗。17.05.2024, Around 363nm SSW of Nova Sintra, Cabo Verde. Ten pirates armed with AK-47 boarded a product tanker and took control of the bridge. All crew muster on the bridge where the pirates tied up their hands and legs. The pirates ordered the 2/E and 4/E to stop engines and drift with the intention of stealing the cargo and bunkers. The pirates stole crew and ship properties. They then moved all the crew into the steering gear room and informed the crew that there were explosive devices fixed on all doors and the crew could only exit after two hours. Once the crew emerged from the steering gear room no pirates or explosives found. The pirates had damaged communication, internet, navigation equipment and the air control pipes for the main engine and cylinder oil flow valves before escaping. The crew managed to sail the vessel to the next port. No cargo or bunkers stolen.

海上事件 Marine Incidents

据新加坡民防部队(SCDF)报道，5月15号上周三午夜，接到了来自一艘7500载重吨化学品船的火灾警报。当西海岸海上消防站的消防员登上这艘船时，可以看到烟雾从机舱冒出来。在进行灭火过程中，一名新加坡消防员遇难。据新加坡海事和港口管理局称，火灾事故发生在Raffles Reserved锚地抛锚的SHENG HANG HUA 6(2022年建造)船上。According to the Singapore Civil Defence Force (SCDF), a fire alarm was received from a 7,500-DWt chemical tanker at midnight last Wednesday, May 15. As firefighters from the West Coast Marine Fire Station boarded the ship, smoke could be seen coming from the engine room. One Singaporean firefighter was killed while fighting the blaze. According to the Maritime and Port Authority of Singapore, the fire incident occurred on board SHENG HANG HUA 6(built 2022), which was anchored at Raffles Reserved Anchorage.

其它 Others

没有 Nil.

备注 Remark

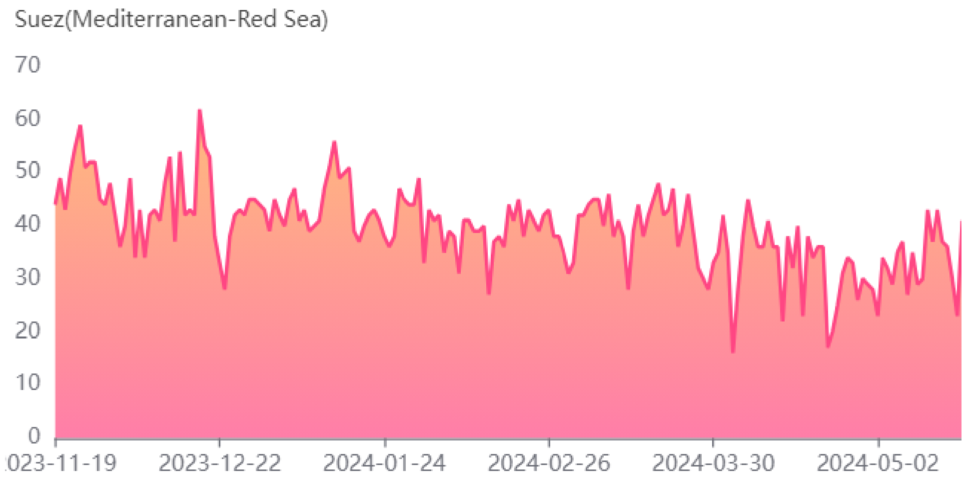
本报告数据截止时间为2024年5月19日北京时间17点；所有数据和或观点仅供参考，在任何情况下本公司及其员工不承担任何风险。 The data deadline for this report is Beijing time 17 hours on May 19 of 2024; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

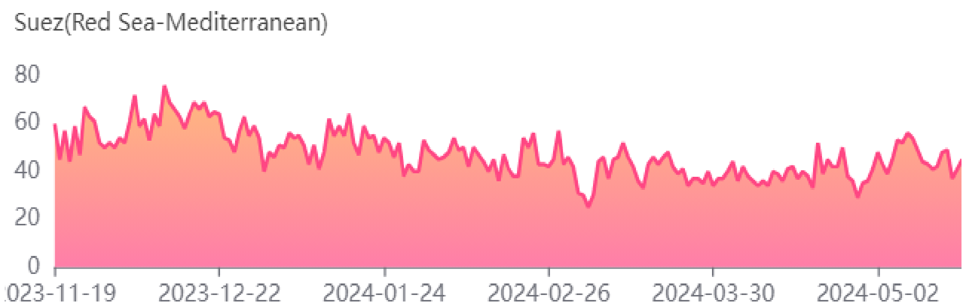
第二部分 航运数据 SHIPPING DATA

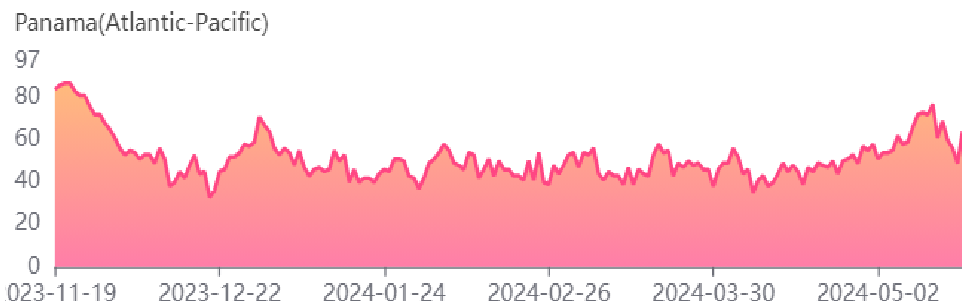
最近一周船舶运河/河口锚地等待数量

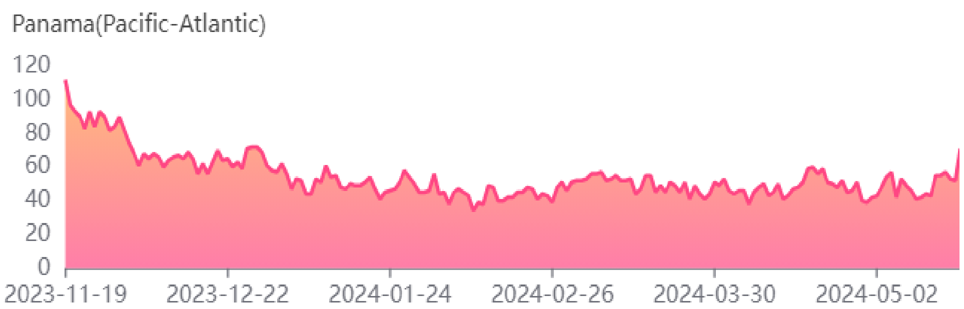
Latest Week Update Vessel Waiting Numbers Information in Anchorages of Canals and Rivers

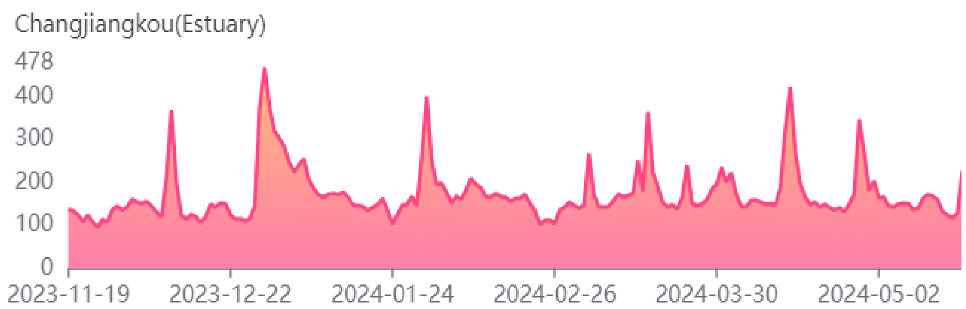
Canal/Riv.	P.N.	M.N.	WoW	MoM
Suez.Red	45	1262	-50	153
Miss.Riv.	2	124	-11	35
CJK	227	4742	22	-667
Pa.Atlan.	64	1674	-9	352
Colum.Riv.	5	149	1	-19
Suez.Med.	41	910	25	-101
Pa.Pac.	71	1428	56	40
ZJK	139	2988	-4	594

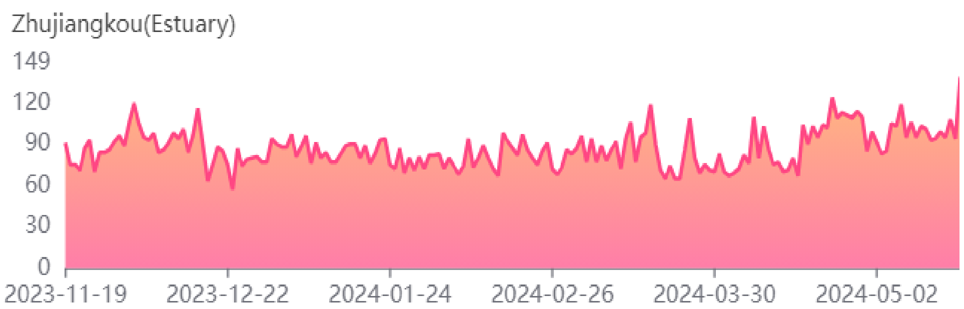


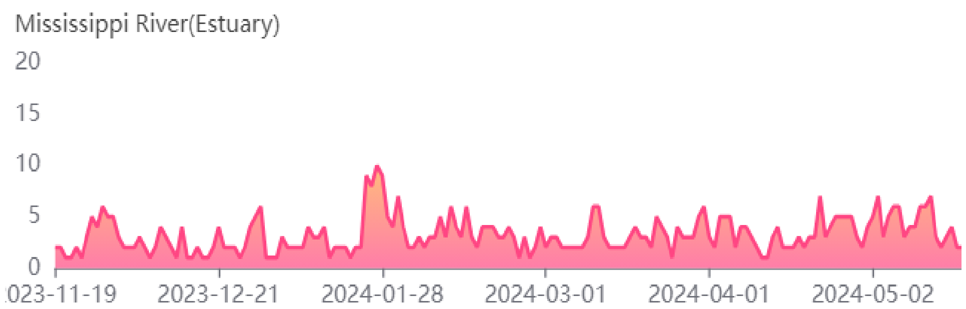


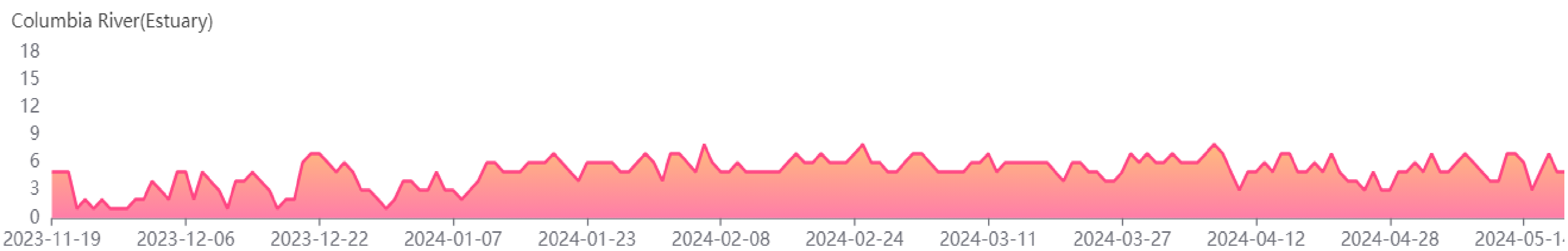










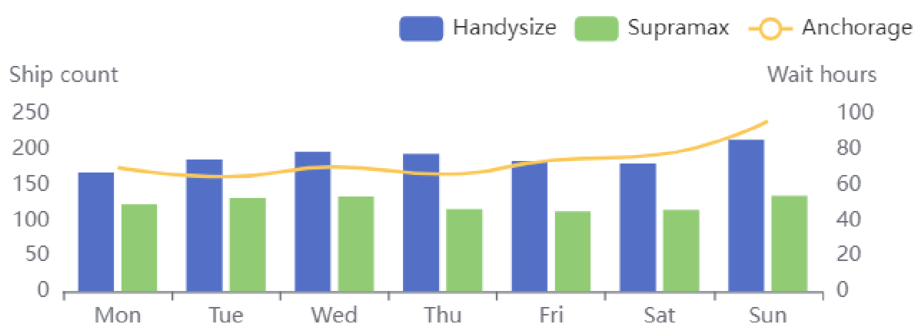


(P.N-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

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

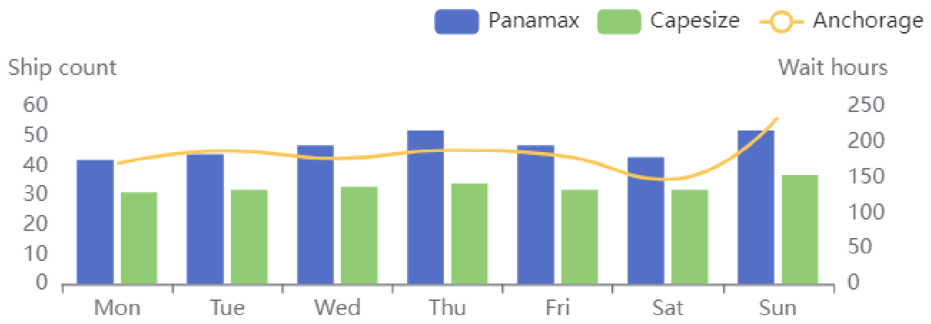
Type	M	T	W	Th	F	Sat	Sun
HDY	168	186	197	194	184	180	214
SMX	123	132	134	116	113	115	135
WT.h.	69.8	64.7	70.3	66.15	73.9	77.2	96



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

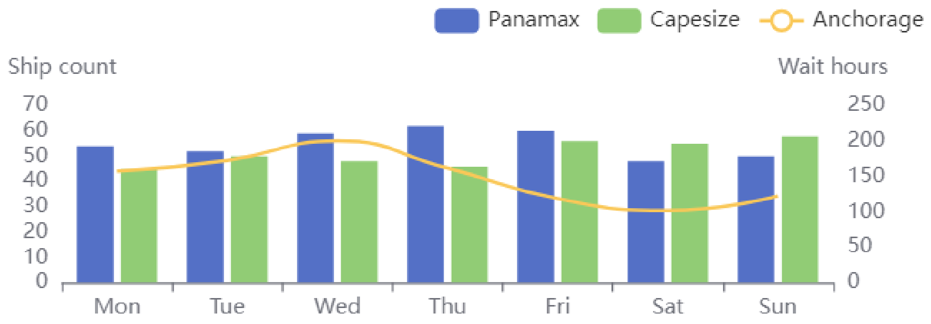
Type	M	T	W	Th	F	Sat	Sun
Pan.	42	44	47	52	47	43	52
Cap	31	32	33	34	32	32	37
WT.h.	169.9	188.1	177.2	189	181.6	147.9	235



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

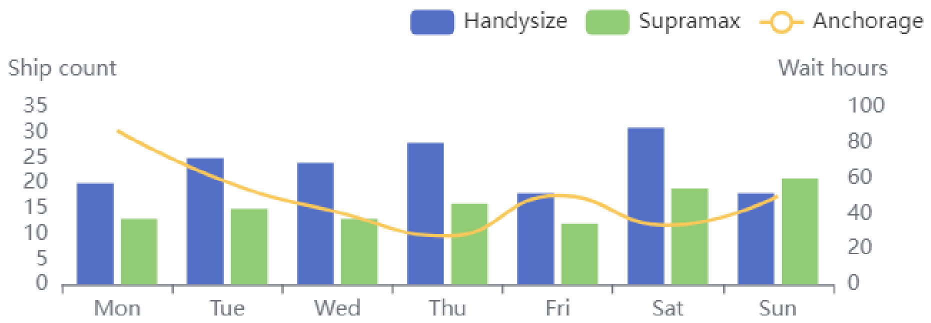
Type	M	T	W	Th	F	Sat	Sun
Pan.	54	52	59	62	60	48	50
Cap	45	50	48	46	56	55	58
WT.h.	157.3	172.75	200.2	161.9	118.9	102	122.5



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

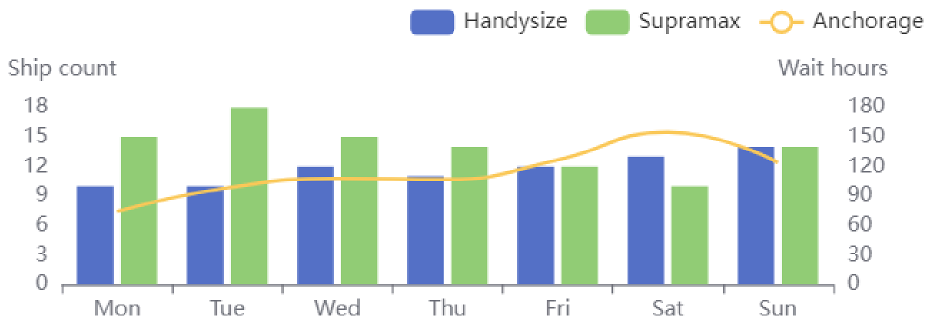
Type	M	T	W	Th	F	Sat	Sun
HDY	20	25	24	28	18	31	18
SMX	13	15	13	16	12	19	21
WT.h.	86.9	57.8	40.9	27.5	50.3	33.55	50



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

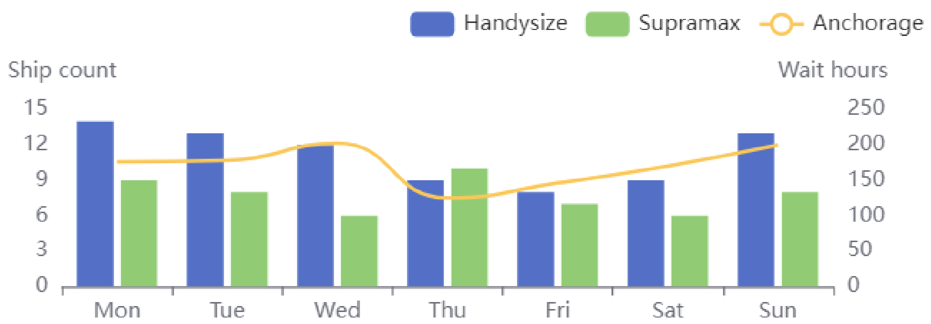
Type	M	T	W	Th	F	Sat	Sun
HDY	10	10	12	11	12	13	14
SMX	15	18	15	14	12	10	14
WT.h.	74.3	98.3	107.7	106.7	126.65	154.7	124



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

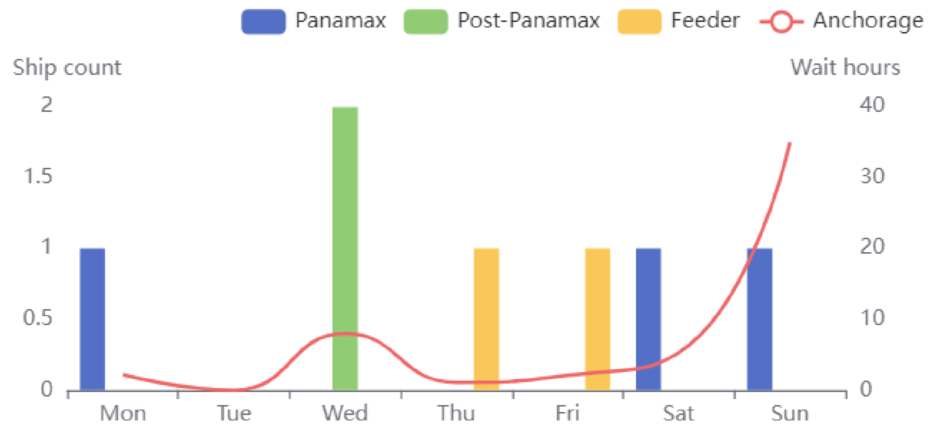
Type	M	T	W	Th	F	Sat	Sun
HDY	14	13	12	9	8	9	13
SMX	9	8	6	10	7	6	8
WT.h.	176.3	178.2	202.2	125	146.2	170.2	200



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

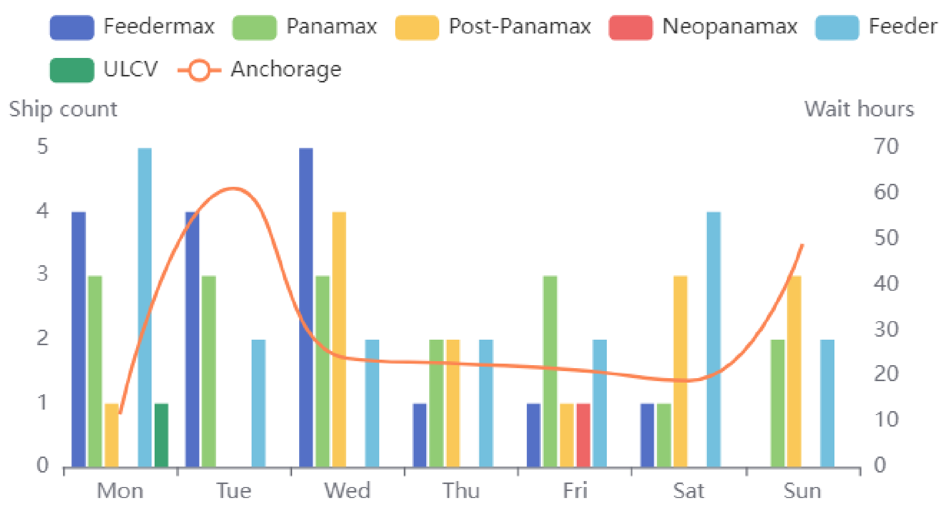
Type	M	T	W	Th	F	Sat	Sun
F.ma.	0	0	0	0	0	0	0
Pan.	1	0	0	0	0	1	1
PPx	0	0	2	0	0	0	0
NPx	0	0	0	0	0	0	0
Fd	0	0	0	1	1	0	0
WT.h.	2.2	0.0	8	1.1	2.1	5.3	35
Ulcv	0	0	0	0	0	0	0



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

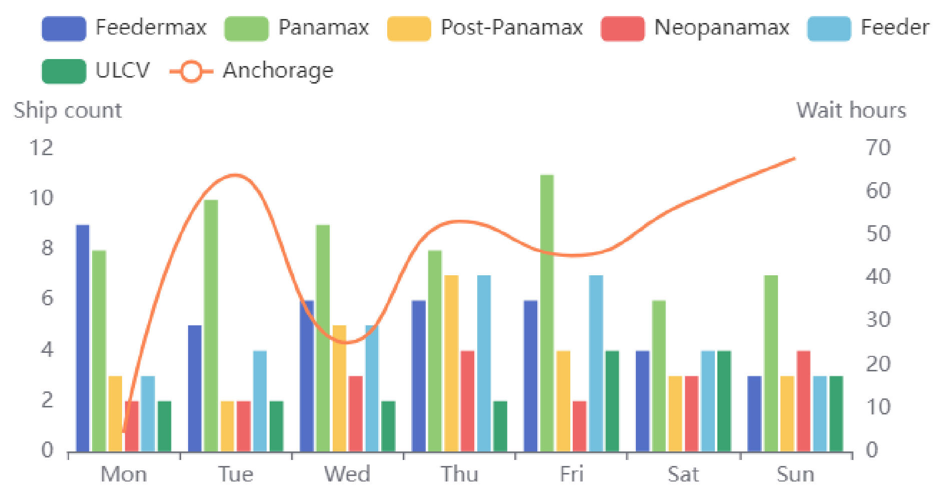
Type	M	T	W	Th	F	Sat	Sun
F.ma.	4	4	5	1	1	1	0
Pan.	3	3	3	2	3	1	2
PPx	1	0	4	2	1	3	3
NPx	0	0	0	0	1	0	0
Fd	5	2	2	2	2	4	2
Ulcv	1	0	0	0	0	0	0
WT.h.	11.65	61.2	23.9	22.7	21.35	19	49



最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

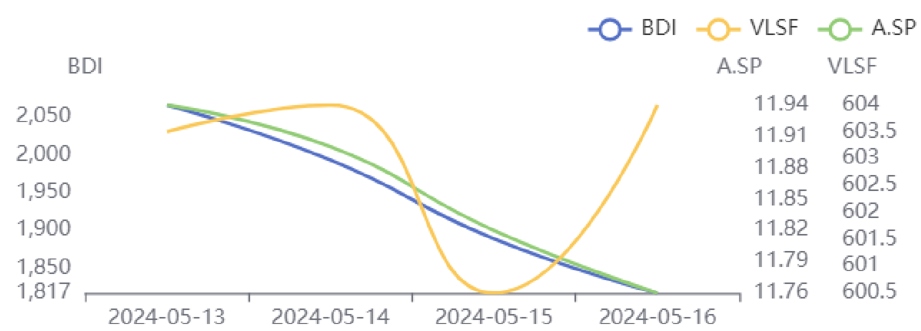
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

Type	M	T	W	Th	F	Sat	Sun
F.ma.	9	5	6	6	6	4	3
Pan.	8	10	9	8	11	6	7
PPx	3	2	5	7	4	3	3
NPx	2	2	3	4	2	3	4
Fd	3	4	5	7	7	4	3
Ulcv	2	2	2	2	4	4	3
WT.h.	4.3	64.1	25.2	53.4	45.4	57.4	68



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

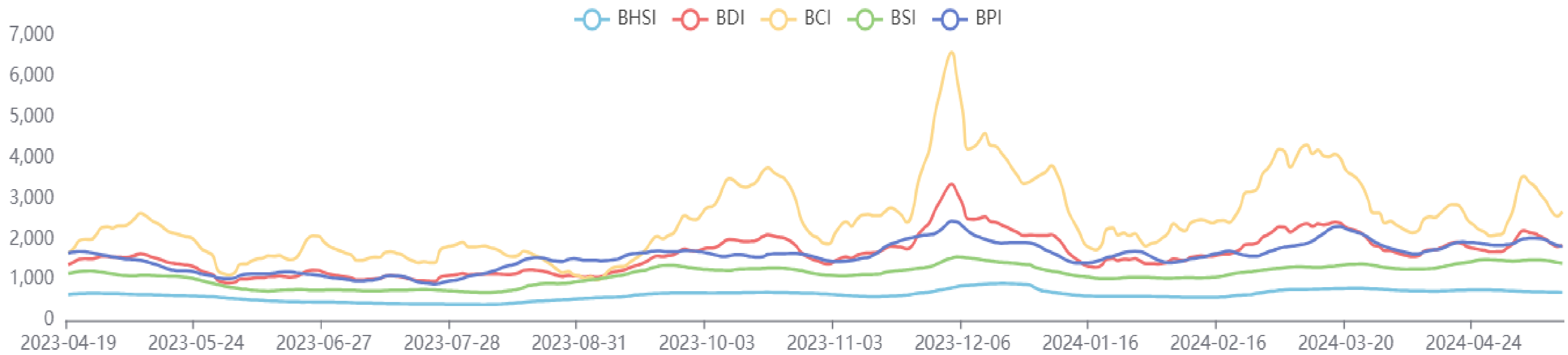
Type	M	T	W	Th	F	Sat	Sun
BDI	2017	1978	1905	1845	1825		
VLSF	603.50	604.00	600.50	604.00			
A.SP	11.94	11.9	11.82	11.76	11.85	11.93	



第三部分 航运市场 SHIPPING MARKET

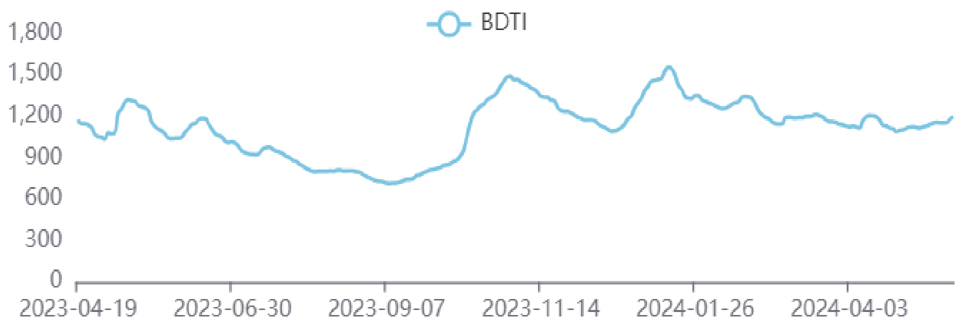
波罗的海干散货指数Baltic Dry Index

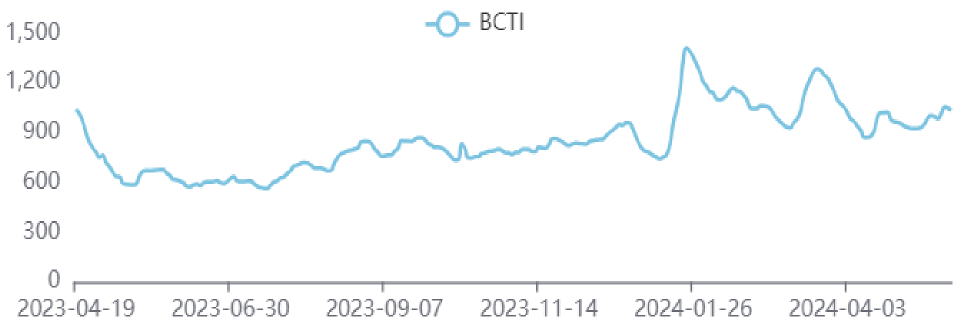
Type	PI	WoW	W%	M%	y%
BDI	1844	-285.0	-13.39	-3.91	29.4
BCI	2675	-617.0	-18.74	-5.78	22.48
BPI	1825	-201.0	-9.92	-4.75	44.84
BSI	1405	-80.0	-5.39	0.79	28.9
BHSI	690	-13.0	-1.85	-6.88	11.83

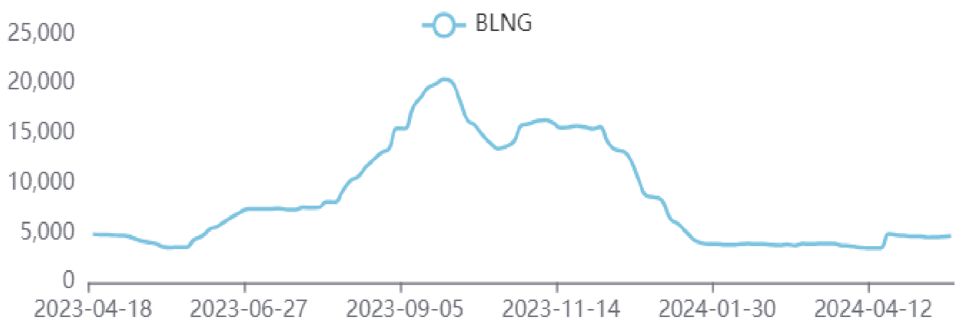


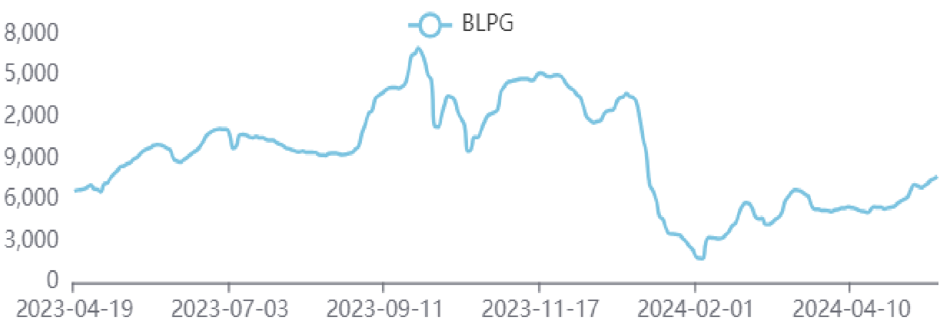
能源运价指数Energy Shipping Index

Type	PI	WoW	W%	M%	y%
BDTI	1195	40.0	3.46	7.27	-9.33
BCTI	1036	40.0	4.02	1.37	75.89
BLNG	4685	117.0	2.56	-4.07	30.36
BLPG	7695	817.0	11.88	40.75	-8.77

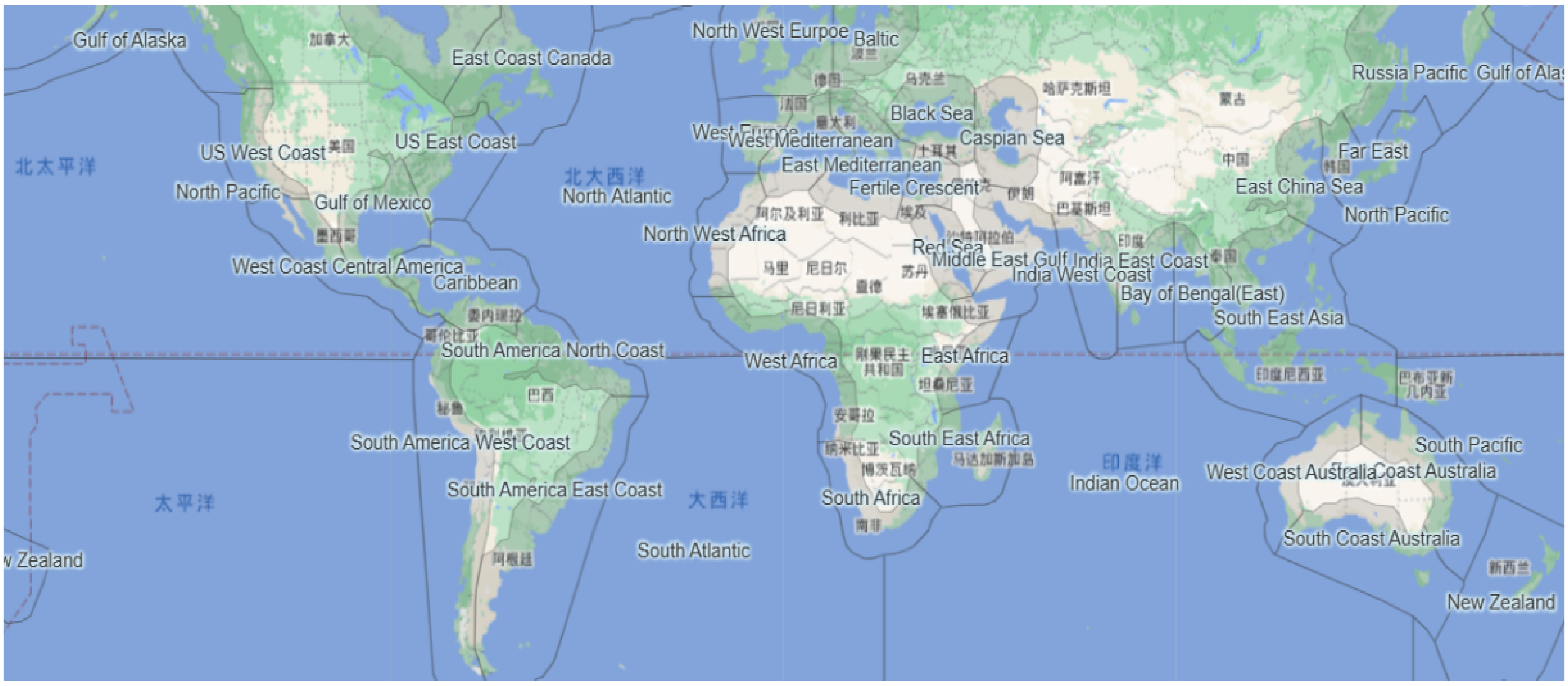








第四部分 运力分布 SUPPLY DISTRIBUTION

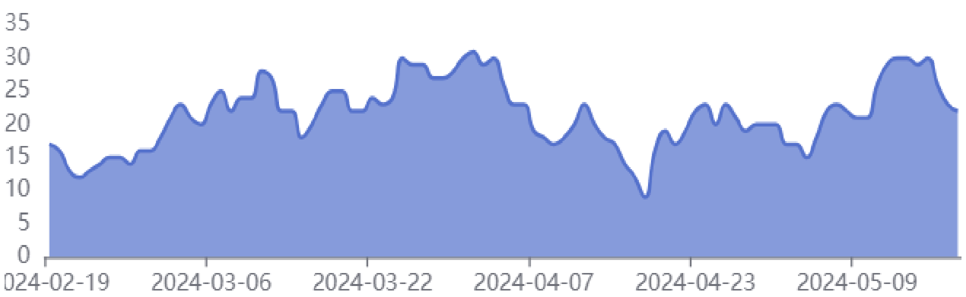


好望角型散货船 Capesize

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.

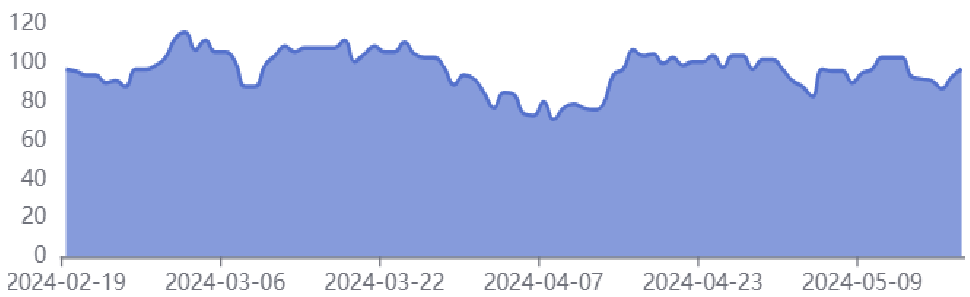
Type	M	T	W	Th	F	Sat	Sun
Cape	30	30	29	30	26	23	22



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.

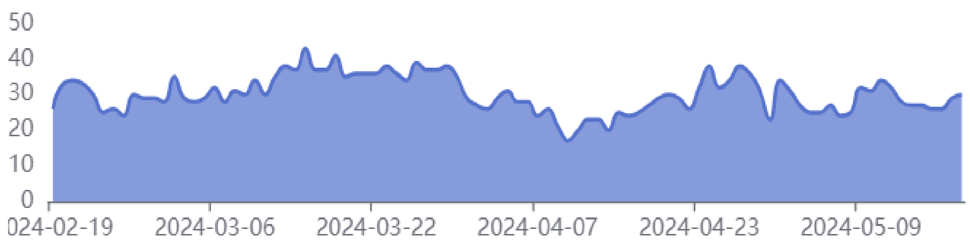
Type	M	T	W	Th	F	Sat	Sun
Cape	103	93	92	91	87	93	97



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	28	27	27	26	26	29	30

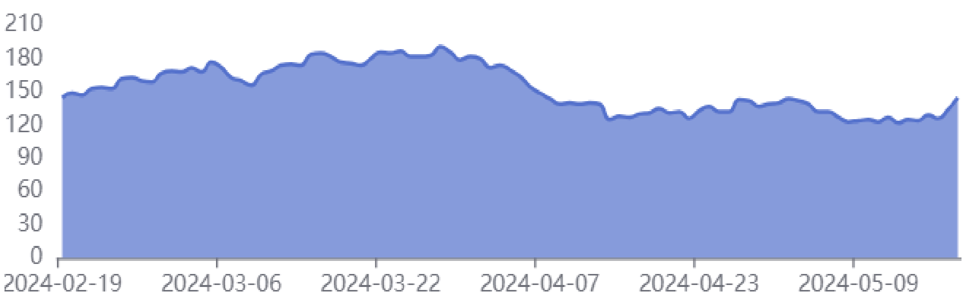


巴拿马型散货船 PANAMAX

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.

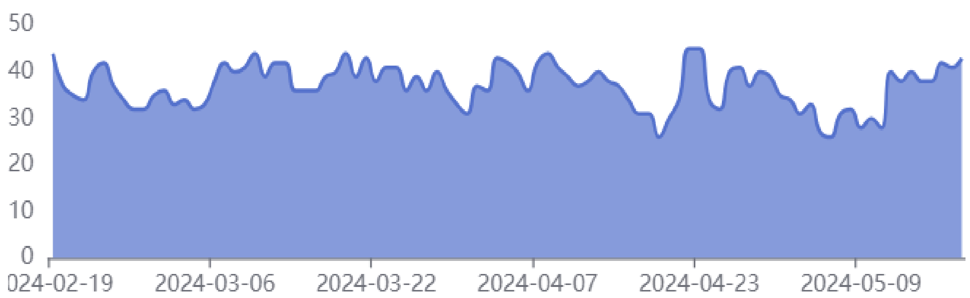
Type	M	T	W	Th	F	Sat	Sun
Pan.	122	125	124	129	126	134	145



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.

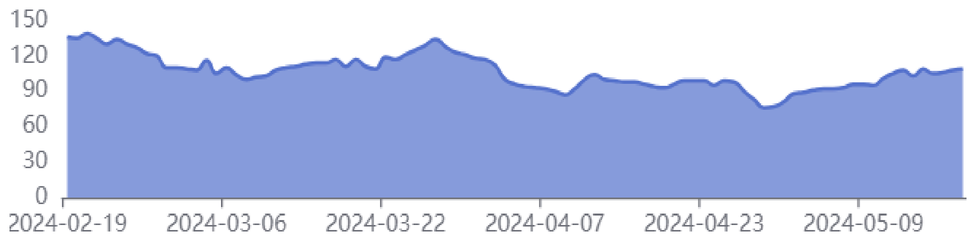
Type	M	T	W	Th	F	Sat	Sun
Pan.	24	24	25	28	29	28	29



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.	108	103	109	105	106	108	109

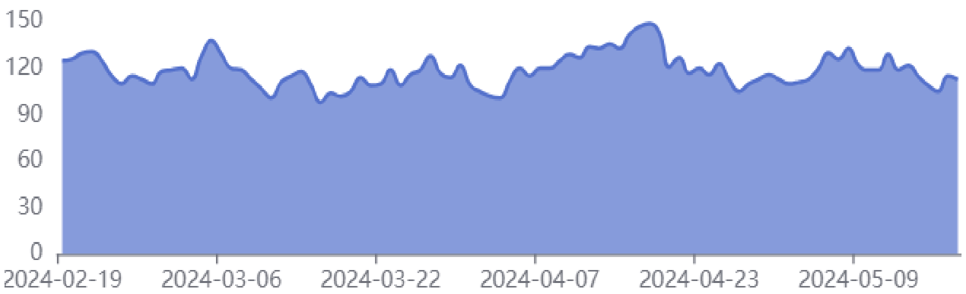


超大灵便型散货 SUPRAMAX

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.

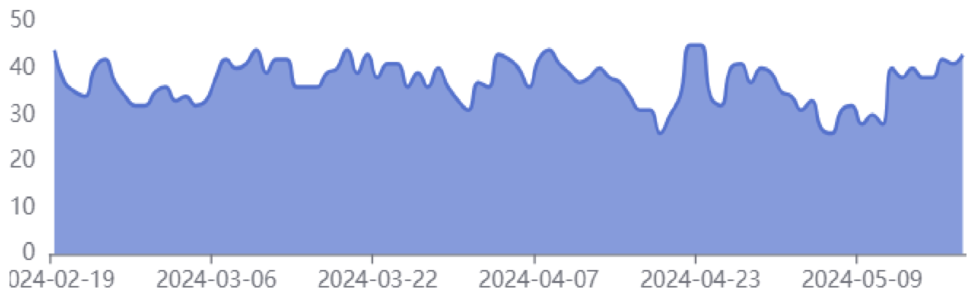
Type	M	T	W	Th	F	Sat	Sun
SMX	119	122	115	109	105	115	113



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.

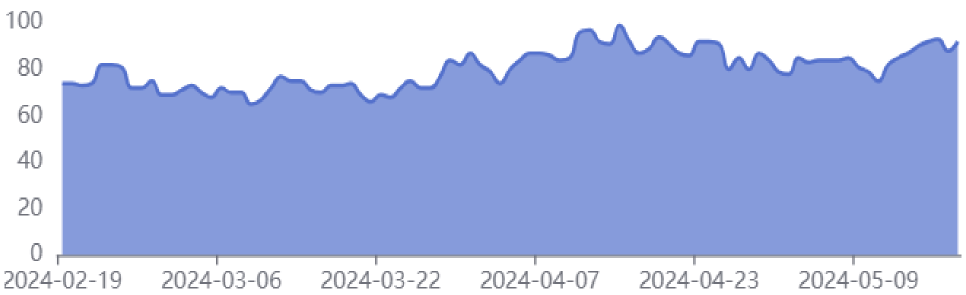
Type	M	T	W	Th	F	Sat	Sun
SMX	38	40	38	38	42	41	43



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.

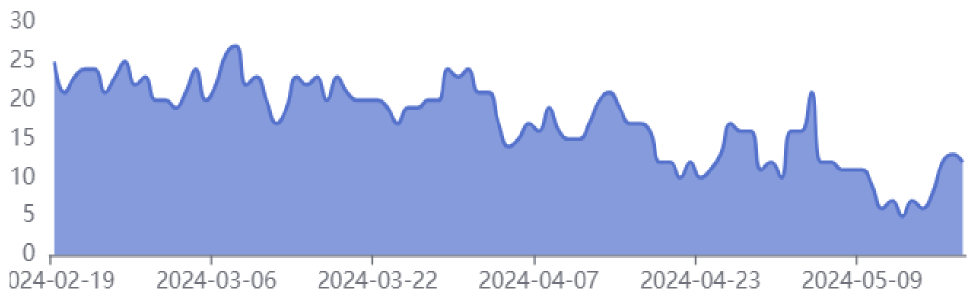
Type	M	T	W	Th	F	Sat	Sun
SMX	5	7	6	8	12	13	12



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.

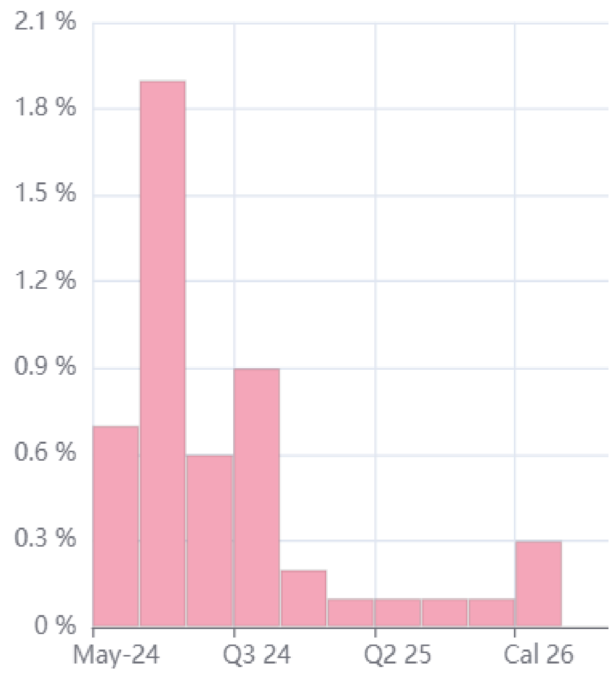
Type	M	T	W	Th	F	Sat	Sun
SMX	85	87	90	92	93	88	92

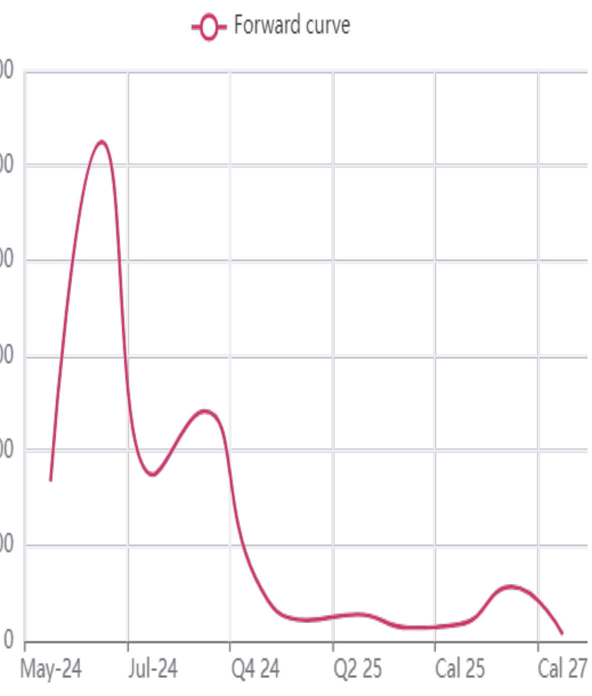


第五部分 远期运价协议 FFA

好望角型散货船Capesize

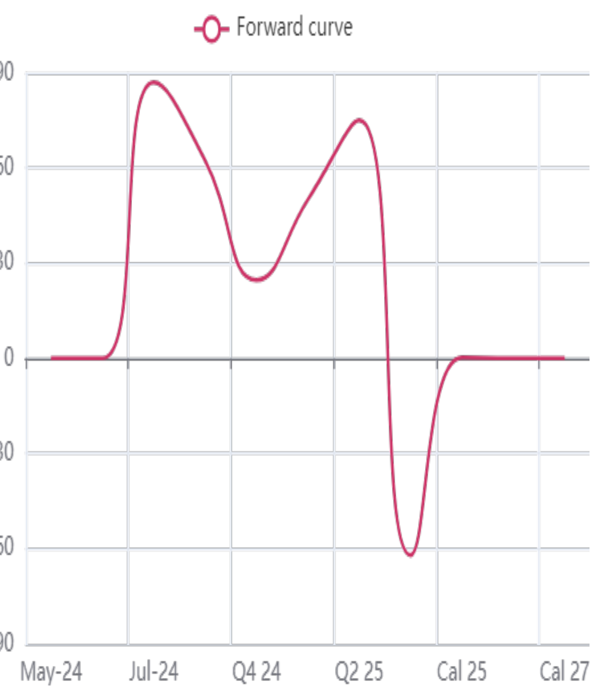
5TC	$/day	WoW	
May-24	24,418.00	168.0	0.7 %
Jun-24	28,236.00	525.0	1.9 %
Jul-24	27,571.00	175.0	0.6 %
Q3 24	27,289.33	241.67	0.9 %
Q4 24	27,295.67	66.67	0.2 %
Q1 25	16,068.00	22.0	0.1 %
Q2 25	21,296.00	28.0	0.1 %
Q3 25	24,271.00	14.0	0.1 %
Cal 25	21,451.50	17.75	0.1 %
Cal 26	20,450.00	57.0	0.3 %
Cal 27	19,439.00	7.0	0.0 %





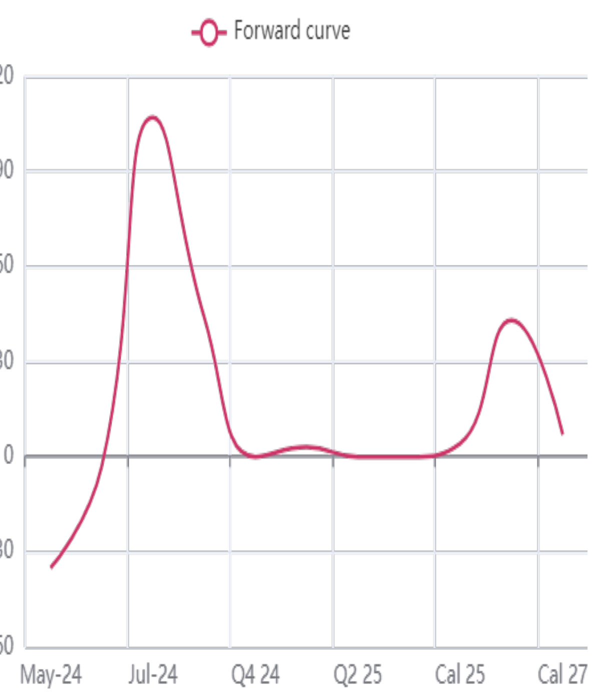
灵便型散货船Handysize

7TC	$/day	WoW	
May-24	12,938.00	0.0	0.0 %
Jun-24	13,063.00	0.0	0.0 %
Jul-24	13,300.00	87.0	0.7 %
Q3 24	13,179.33	62.33	0.5 %
Q4 24	13,012.67	24.67	0.2 %
Q1 25	11,013.00	50.0	0.5 %
Q2 25	12,350.00	75.0	75.0
Q3 25	12,295.00	-62.0	-0.5 %
Cal 25	11,988.25	0.25	0.0 %
Cal 26	11,688.00	0.0	0.0 %
Cal 27	11,513.00	0.0	0.0 %



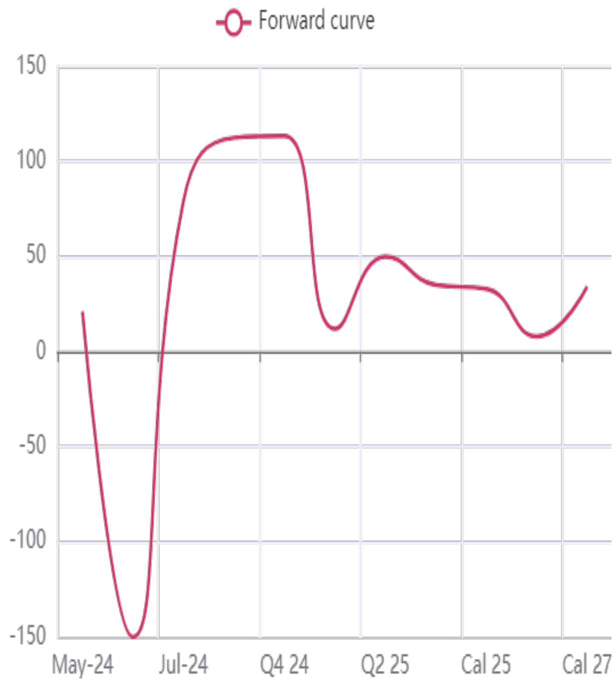
巴拿马型散货船Panamax

4TC	$/day	WoW	
May-24	15,686.00	-35.0	-0.2 %
Jun-24	16,243.00	-3.0	0.0 %
Jul-24	16,571.00	107.0	0.6 %
Q3 24	16,269.00	44.0	0.3 %
Q4 24	15,250.00	0.0	0.0 %
Q1 25	12,821.00	3.0	0.0 %
Q2 25	14,271.00	0.0	0.0 %
Q3 25	14,064.00	0.0	0.0 %
Cal 25	13,701.50	4.25	0.0 %
Cal 26	12,807.00	43.0	0.3 %
Cal 27	12,507.00	7.0	0.1 %



超大灵便型散货船Supramax

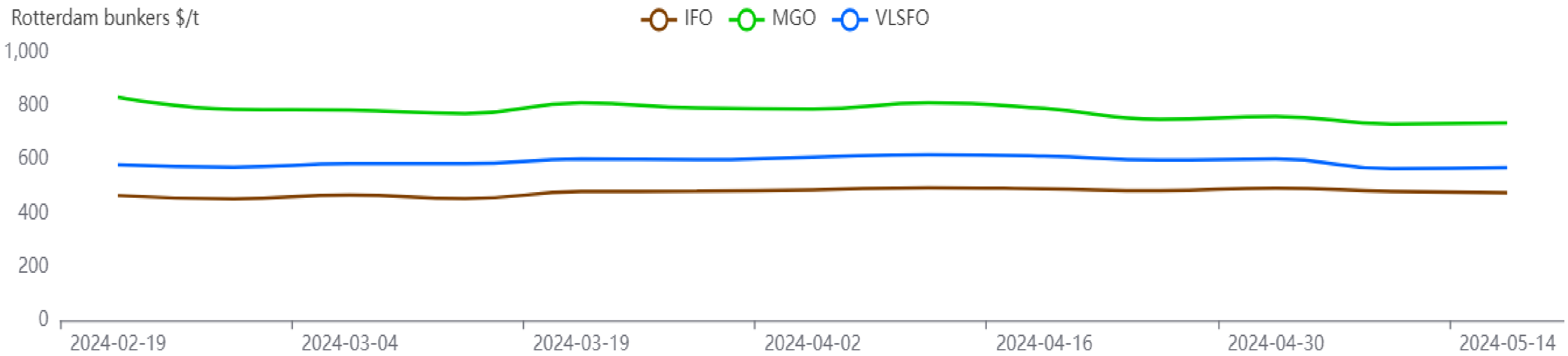
10TC	$/day	WoW	
May-24	15,725.00	21.0	0.1 %
Jun-24	15,275.00	-150.0	-1.0 %
Jul-24	15,525.00	79.0	0.5 %
Q3 24	15,386.00	112.33	0.7 %
Q4 24	14,688.00	113.33	0.8 %
Q1 25	12,033.00	12.0	0.1 %
Q2 25	13,513.00	50.0	0.4 %
Q3 25	13,343.00	35.0	0.3 %
13,058.00	Cal 25	33.0	0.3 %
Cal 26	12,333.00	8.0	0.1 %
Cal 27	12,142.00	34.0	0.3 %

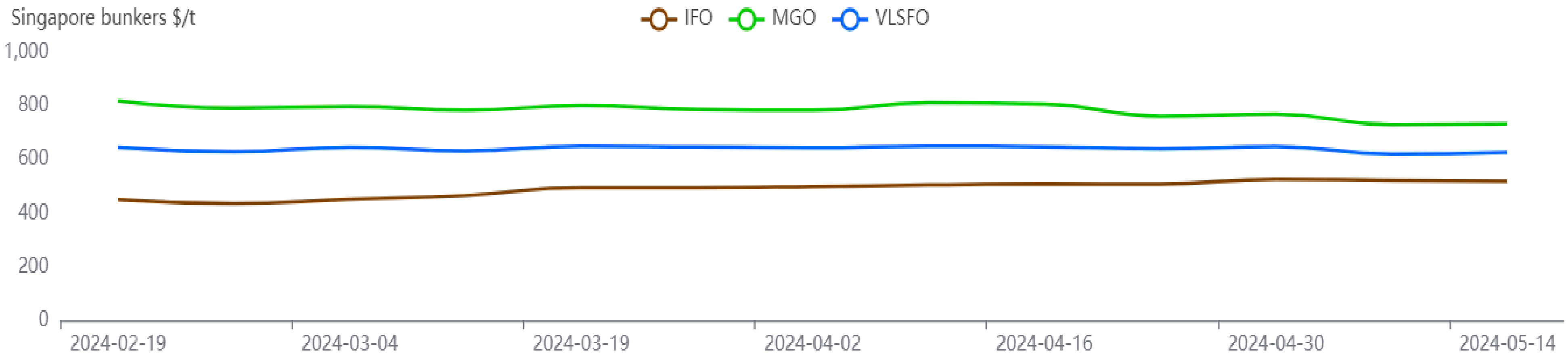


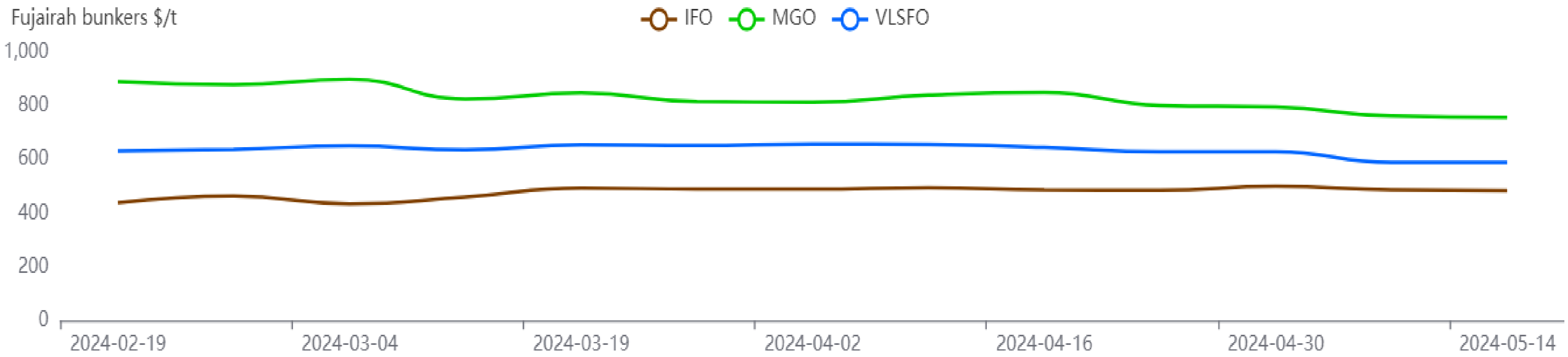
第六部分 燃油价格 BUNKER PRICE

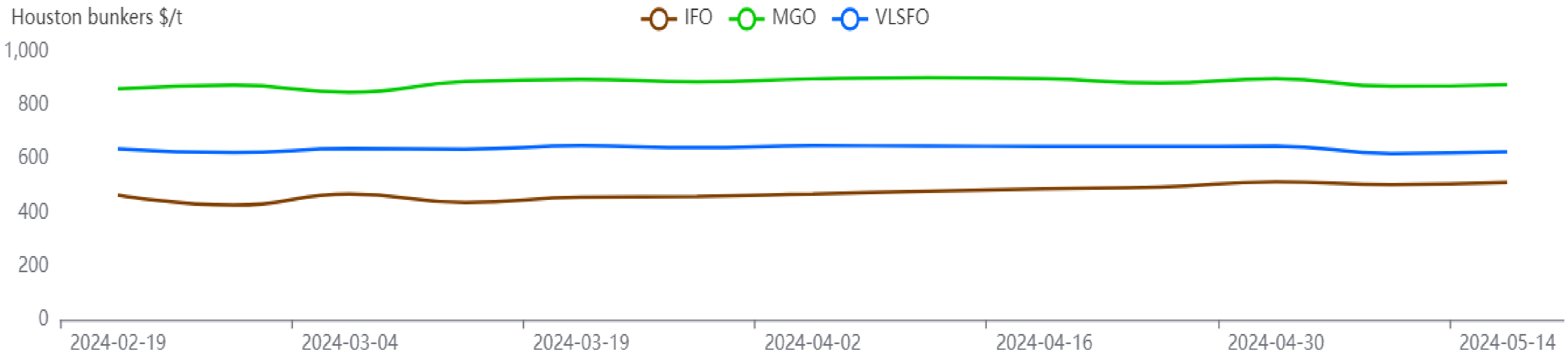
MP	LO	HO	MO	SP	WoW	W%	M%
zhoushan	641.5	536.5	791.5	105.0	-8.0	-7.08	-21.93
Singapore	627.5	520.0	733.5	107.5	9.0	9.14	-22.1
Rotterdam	570.5	477.0	737.0	93.5	8.5	10.0	-23.36
Fujairah	590.0	484.5	758.0	105.5	3.5	3.43	-33.44
Houston	627.0	512.5	878.0	114.5	-2.0	-1.72	-27.76

(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	220.0		3.0	1.38	11.11	-9.36
Maize	212.0		0.0	0.0	6.53	-19.99
Soybeans	231.0		-5.0	-2.12	5.48	-13.83
Rice	250.0		3.0	1.21	1.21	22.31
Barley	225.0		4.0	1.81	8.17	-10.32
Energy		Index	+/-	Weekly	Monthly	YTD
Crude Oil	USD/Bbl	78.48	1.02	1.32	-7.54	8.95
Brent	USD/Bbl	83.04	0.84	1.02	-7.45	9.62
Natural Gas	USD/MMBtu	2.29	0.07	3.15	30.86	4.57
Gasoline	USD/Gal	2.52	0.01	0.4	-9.68	5.44
Heating Oil	USD/Gal	2.44	0.0	0.0	-8.61	4.27
Ethanol	USD/Gal	1.81	0.05	2.84	9.04	-25.21
Naphtha	USD/T	655.26	-9.6	-1.44	-4.81	11.55
Propane	USD/Gal	0.69	0.0	0.0	-15.85	0.0
Uranium	USD/Lbs	92.25	0.0	0.0	3.94	71.79
Methanol	CNY/T	2621.0	-7.0	-0.27	2.54	12.3
TTF Gas	EUR/MWh	29.38	-1.16	-3.8	-3.92	-17.84
UK Gas	GBp/thm	71.3	-3.59	-4.79	-5.9	-14.46
Industrial		Index	+/-	Weekly	Monthly	YTD
Copper	USD/Lbs	4.7	0.15	3.3	9.56	20.51
Coal	USD/T	144.0	-2.6	-1.77	7.66	-15.14
Steel	CNY/T	3480.0	-55.0	-1.56	1.28	-5.25
Iron Ore	USD/T	116.93	-2.63	-2.2	10.26	17.52
Aluminum	USD/T	2540.0	5.5	0.22	-0.2	9.34
Lithium	CNY/T	109500.0	-1000.0	-0.9	N/A	N/A
Metals		Index	+/-	Weekly	Monthly	YTD
Gold	USD/t.oz	2349.1	37.3	1.61	-0.08	16.22
Silver	USD/t.oz	28.1	0.8	2.93	-0.71	9.55
Platium	USD/t.oz	1008.7	21.7	2.2	2.89	-5.18
Currencies	Index		+/-	Weekly	Monthly	YTD
EUR/USD	1.08		0.01	0.93	0.93	-1.82
USD/CNY	7.24		0.01	0.14	-0.28	4.62

第八部分 本周话题 WEEKLY TOPIC

化学品航运市场

化工物流行业是石化工业的服务行业，化工物流运作相对复杂、安全性要求高、技术要求严格、设备专业化。参与物流环节的主要设备工具包括化学品船舶、管道、储罐等。截至2023年12月31日全球经营的IMO级化学品船舶达5100艘，总载重达到 1.25 亿吨。

2023 年期间IMO级化学品船共交付85艘，远低于前3年平均的136艘的交付水平。2024年开始到现在IMO级化学品船交付刚刚过30艘，今年的交付数量应该与2023年相当且处于历史低位水平，根据订单情况预估2025年开始化学品船舶的交付将逐步增加，到2026年会达到峰值。按订单总体情况逻辑判断未来发展到2028年，IMO级化学品船队规模将以接近年2%的年复合增长率增长至1.38亿吨。化学品船队的船龄相对年轻，截至去年底IMO级化学品船队中货舱涂层化学品船舶平均船龄接近13年，不锈钢化学品船舶平均船龄刚刚超过13年。

2023 年中国内贸化学品海运量超过5千万吨，较2022年上涨了12%。但随着2024年下游产业链配套逐步完善，大宗化学品下海货量增速或将降低，化学品内贸海运市场供需关系会逐渐趋于稳定，也可能看到出口规模逐步增加。

国际上化学品航运市场在2023年仍然处于历史高位，就IMO II型13000载重吨化学品船舶一年期租水平而言，2023年相比2022年上涨了30%，2024年第一季度相比2023年上涨了2%。 随着全球对散装液体和液化气运输的需求增加，市场认识到罐式集装箱可能是一种既安全又灵活，且高效的运输方式，从而使得罐式集装箱租赁业务发展迅猛。

2023 年全球GDP增速放缓至3.0%，全球经济展望将2024年全球经济增速设定在3.1%，2025年还将有小幅上升展望至3.2%。2023 年全球化学品市场由于大幅度去库存及需求疲软等影响导致全球化学品及植物油的海运量增长仅为0.3%；2024年在全球产能扩张以及欧洲需求疲软等多重原因影响下，预计全球化学品海运总货量还会少量下调；巴拿马运河拥堵以及红海危机等原因又将使得对化学品船舶需求增加。总体看2024年化学品船舶航运市可能是平稳的一年。

The chemical logistics industry is a service sector of the petrochemical industry, with relatively complex operations, high safety requirements, strict technical requirements, and specialised equipment. Key equipment tools involved in logistics include chemical tankers, pipelines, storage tanks, etc. As of 31st December 2023, the global operation of IMO class chemical tankers reached about 5100 vessels, with a total carrying capacity of 125 million tonnes.

During 2023, a total of 85 IMO class chemical tankers were delivered, significantly lower than the average delivery level of 136 vessels in the previous three years. From the beginning of 2024 until now, just about 30 IMO class chemical tankers have been delivered, indicating that this year's delivery quantity is expected to be similar to 2023 and at a historically low level. Based on order forecasts, it is estimated that deliveries of chemical tankers will gradually increase from 2025 onwards, reaching a peak record in 2026. Looking at the overall order situation, it is logically predicted that by 2028, the fleet size of IMO class chemical tankers will grow to 138 million tonnes at an annual compound growth rate of close to 2%. The average age of the chemical tanker fleet is relatively young, with the average age of cargo hold coated chemical tankers in the IMO class fleet approaching 13 years by the end of last year, while stainless steel chemical tankers have just exceeded 13 years on average.

In 2023, China's domestic chemical shipping volume exceeded 50 million tonnes, showing a 12% increase from 2022. However, as downstream industrial chain support gradually improves in 2024, the growth rate of bulk chemical shipments may decrease, leading to a gradual stabilization of supply and demand in the domestic chemical shipping market, with a potential increase in export volumes.

Internationally, the chemical shipping market remained at historically high levels in 2023. In terms of one-year charter rates for IMO II type 13000 deadweight tonnage chemical tankers, there was a 30% increase in 2023 compared to 2022, and a further 2% increase in the first quarter of 2024 compared to 2023. With the increasing global demand for bulk liquids and liquefied gas transportation, the market recognizes that tank containers may be a safe, flexible, and efficient mode of transport, leading to rapid development in tank container leasing business.

In 2023, global GDP growth slowed to 3.0% and WEO put Global growth is projected to stay at 3.1 percent in 2024 and rise to 3.2 percent in 2025. Due to significant destocking and weak demand, the global chemical and vegetable oil shipping volume only grew by 0.3% in 2023. In 2024, influenced by global capacity expansion and weak demand in Europe among other factors, a slight reduction in the total global chemical shipping volume is expected. Factors such as congestion in the Panama Canal and the crisis in the Red Sea will further increase the demand for chemical tankers. Overall, it is anticipated that 2024 will be a relatively stable year for the chemical tanker shipping market.