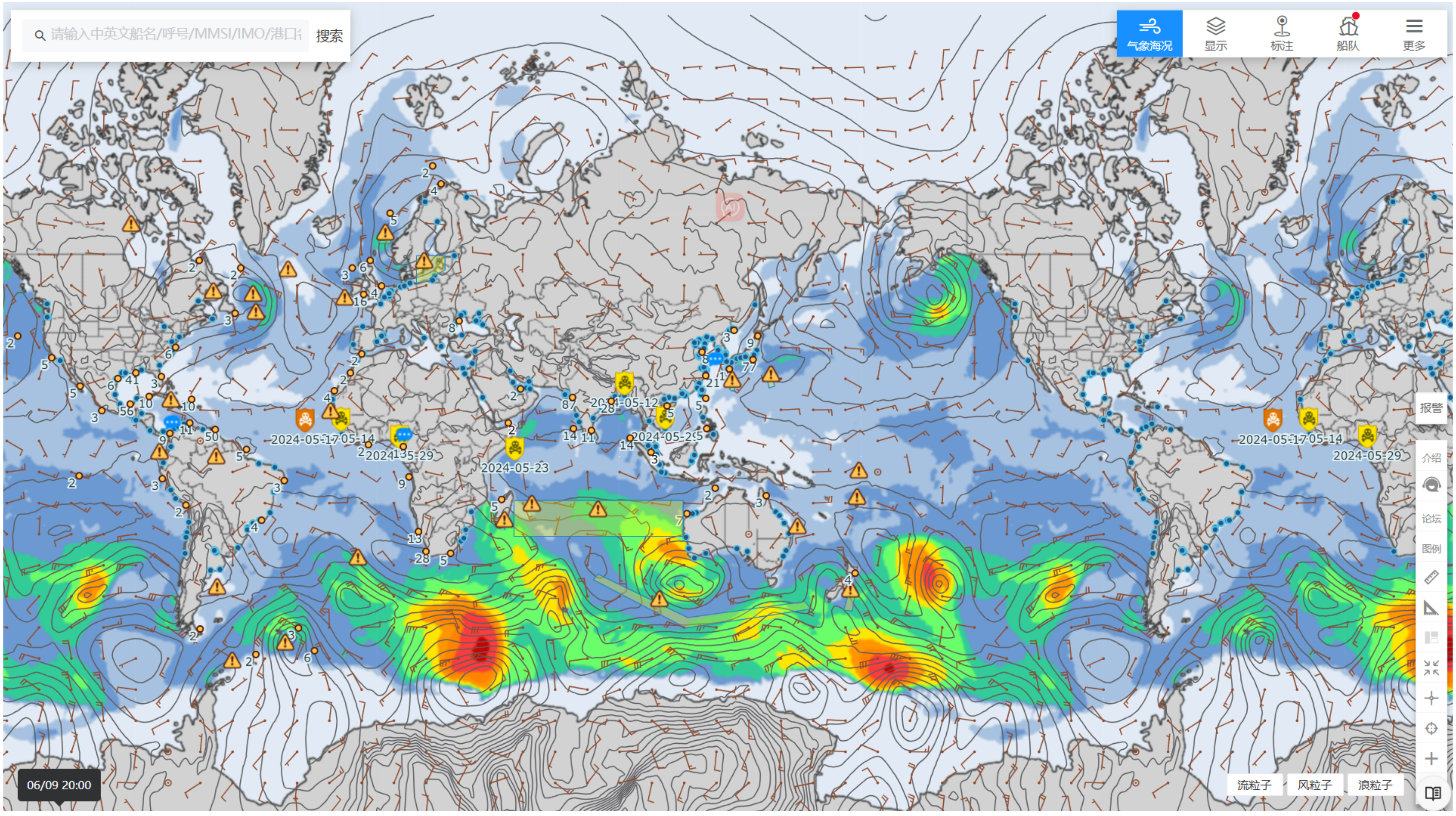
2024年
第23周市场周报

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817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 817 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、黄海、东海海域风力从3-4级增强到5-6级，相关海域海浪将从1米轻浪到2米中浪；台湾海峡风力有时7级，台湾海峡洋面海浪可能经历3大浪，南海大部海域风力维持在5-6级，中浪。东北太平洋北部区域有个低压正在发展。The coming week the wind in Bohai Sea, Yellow Sea and China East Sea will become strong from moderate to breeze with seas from slight to moderate. The wind in the Taiwan Strait might experience near gale and the sea there happens to experience rough. In most of the South China Sea the wind stays breeze with moderate seas. There is one low-pressure developing in the north of East North Pacific Ocean.

海盗事件 Piracy

北京时间5月30日早上5点，赤道几内亚马拉博岛西南约28海里。大约9名海盗登上了一艘正在航行的普通货船。他们带着偷来的GMDSS设备、船上给养、船员个人物品逃走了，并绑架了船长和轮机长。剩下的船员把船驶向一个安全的港口。。29.05.2024: 2110 UTC: Psn: 03:12N - 007:58E, Around 28nm SW of Malabo Island, Equatorial Guinea. About nine pirates boarded a general cargo ship underway. They escaped with stolen GMDSS equipment, ship provisions, crew personal effects and kidnapped the Master and Chief Engineer. Remaining crew sailed the vessel to a safe port.

海上事件 Marine Incidents

6月9号，英国海上贸易行动(UKMTO)报告了两起独立的事件，其中"不明炮弹"击中了该地区的两艘不明船只。据说这两艘船在船上发生火灾后正在前往下一个停靠港，但没有造成人员伤亡。On 9th June, the UK Maritime Trade Action (UKMTO) reported two separate incidents in which "unidentified shells" struck two unidentified vessels in the area. The two ships were said to be on their way to their next port of call after a fire broke out on board, but there were no casualties.

其它 Others

没有 Nil

备注 Remark

本报告数据截止时间为2024年6月9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 June 9th of 2024; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

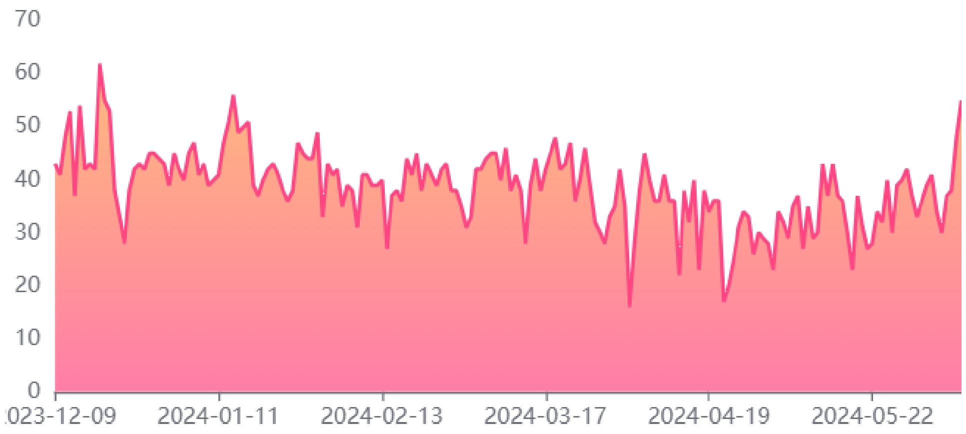
第二部分 航运数据 SHIPPING DATA

最近一周船舶运河/河口锚地等待数量

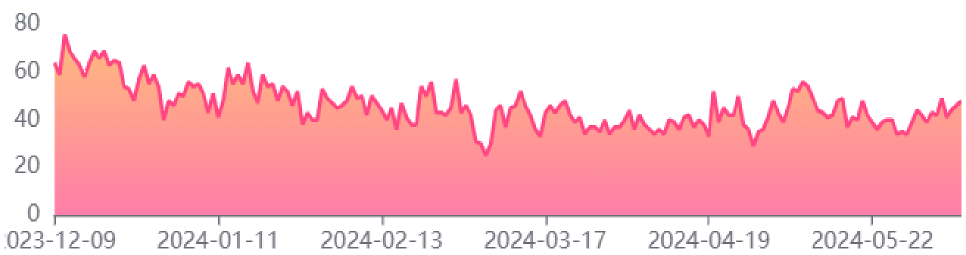
Latest Week Update Vessel Waiting Numbers Information in Anchorages of Canals and Rivers

Canal/Riv.	P.N.	M.N.	WoW	MoM
Suez.Red	48	1205	45	-37
Miss.Riv.	1	75	-17	-44
CJK	157	4313	98	-877
Pa.Atlan.	63	1499	50	-57
Colum.Riv.	3	139	2	-12
Suez.Med.	55	1057	26	153
Pa.Pac.	47	1448	-4	42
ZJK	95	3097	28	221

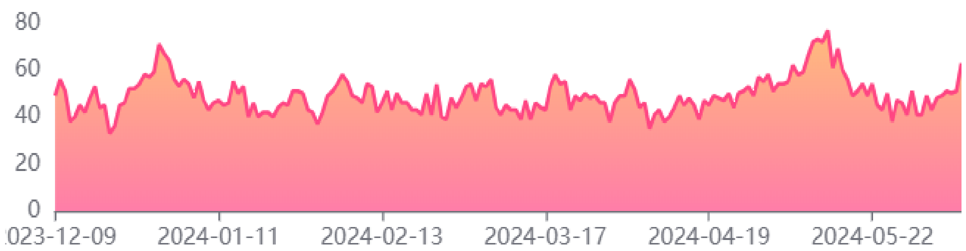
Suez(Mediterranean-Red Sea)



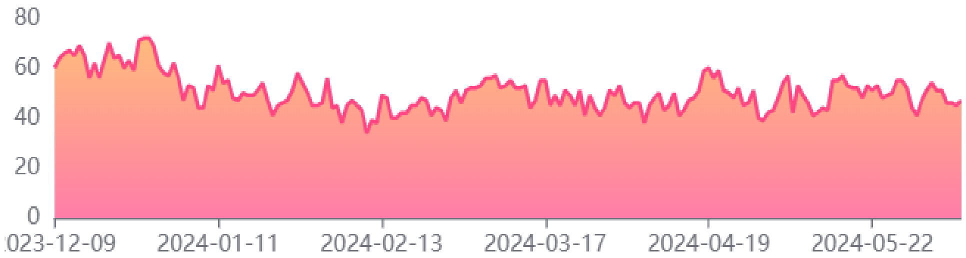
Suez(Red Sea-Mediterranean)



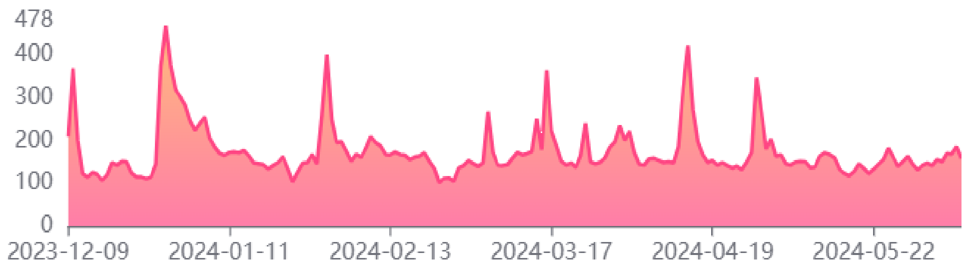
Panama(Atlantic-Pacific)



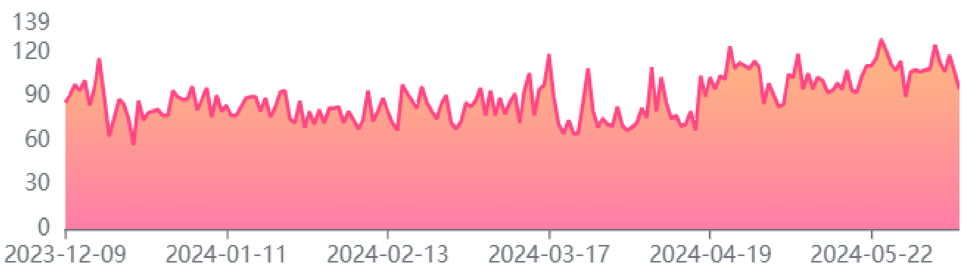
Panama(Pacific-Atlantic)



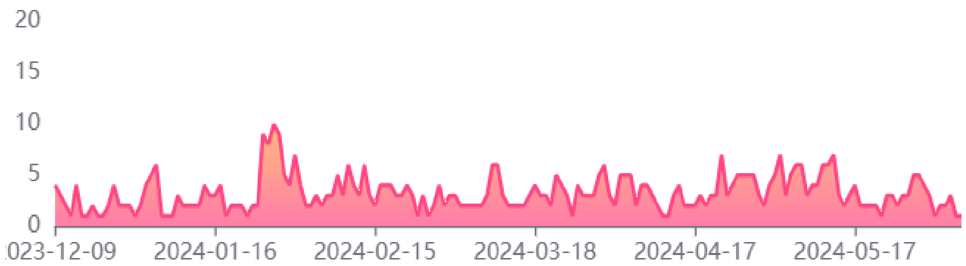
Changjiangkou(Estuary)



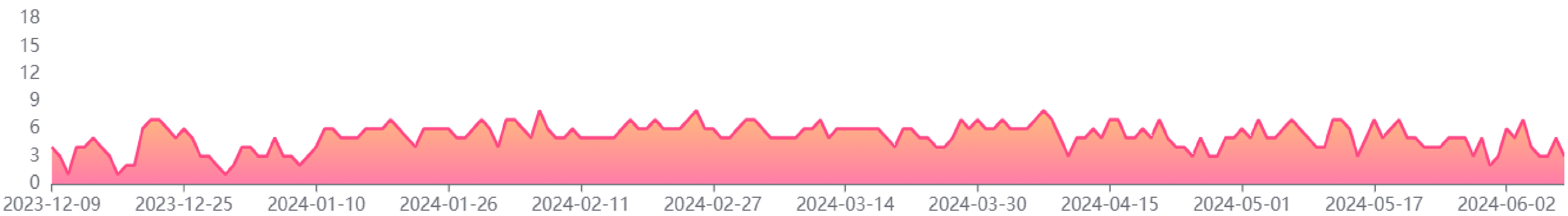
Zhujiangkou(Estuary)



Mississippi River(Estuary)



Columbia River(Estuary)

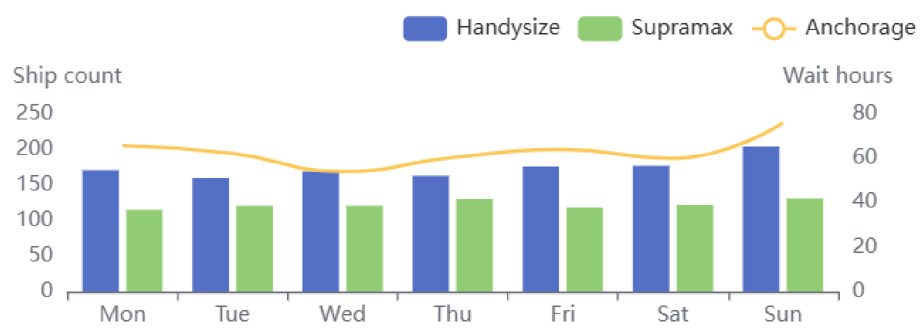


(P.N-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

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

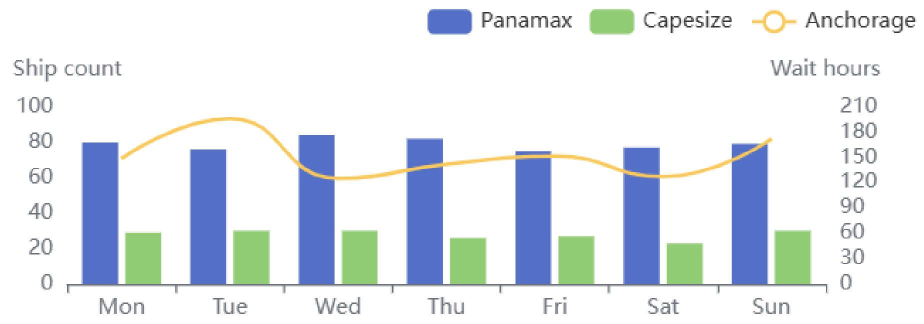
Type	M	T	W	Th	F	Sat	Sun
HDY	171	160	169	163	176	177	204
SMX	115	121	121	130	118	122	131
WT.h.	65.8	62.2	54.05	60.4	64	60	76



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

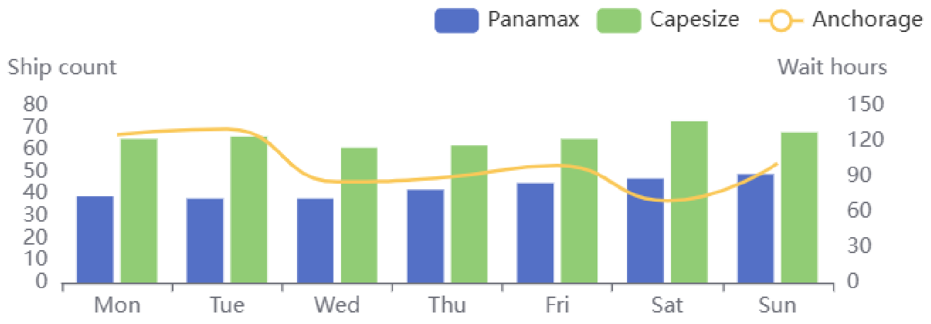
Type	M	T	W	Th	F	Sat	Sun
Pan.	80	76	84	82	75	77	79
Cap	29	30	30	26	27	23	30
WT.h.	148.6	196.1	125.1	141.9	151.7	127.3	172



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

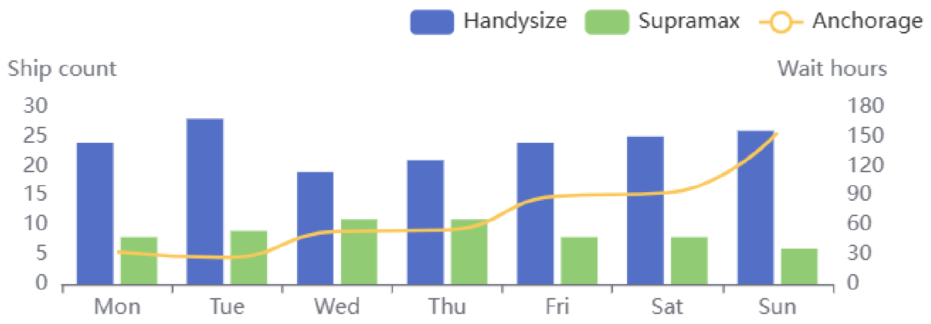
Type	M	T	W	Th	F	Sat	Sun
Pan.	39	38	38	42	45	47	49
Cap	65	66	61	62	65	73	68
WT.h.	125.3	130.1	85.4	89.3	99.3	69.3	101



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

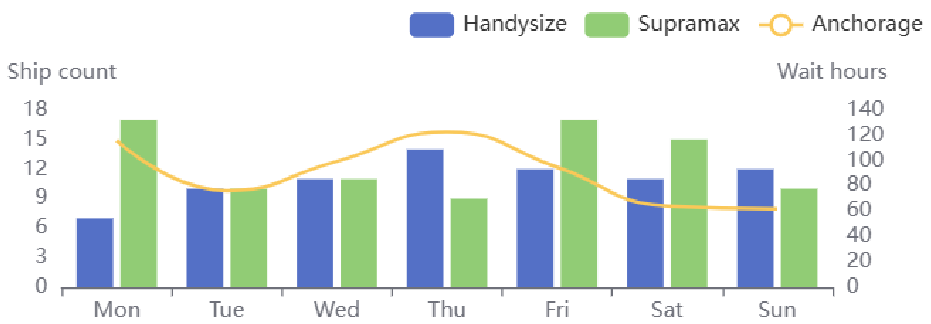
Type	M	T	W	Th	F	Sat	Sun
HDY	24	28	19	21	24	25	26
SMX	8	9	11	11	8	8	6
WT.h.	32.6	27.1	53.55	55.15	89.4	92.9	154



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

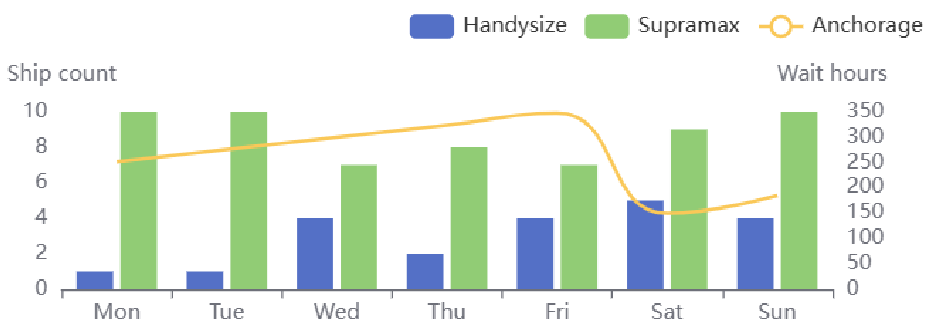
Type	M	T	W	Th	F	Sat	Sun
HDY	7	10	11	14	12	11	12
SMX	17	10	11	9	17	15	10
WT.h.	115.95	76.3	99.5	122.7	94.9	64.15	62



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

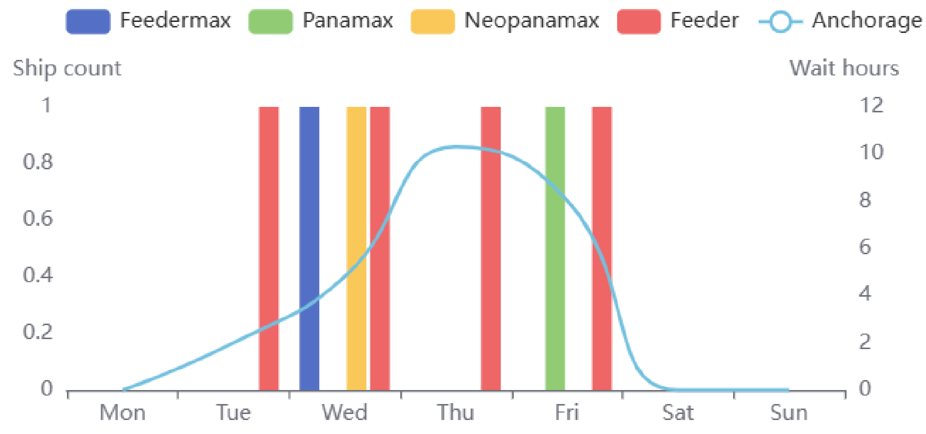
Type	M	T	W	Th	F	Sat	Sun
HDY	1	1	4	2	4	5	4
SMX	10	10	7	8	7	9	10
WT.h.	251.5	275.5	299.5	323.5	347.5	149.5	185



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

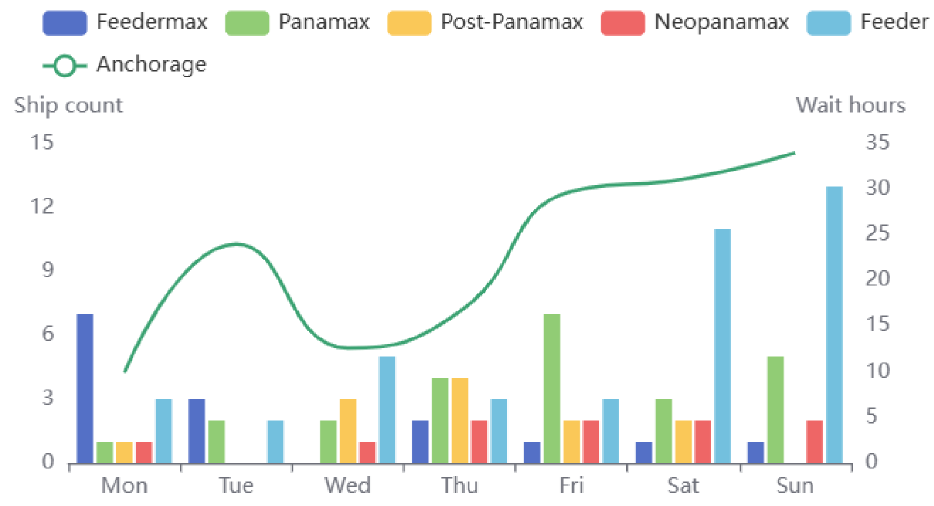
Type	M	T	W	Th	F	Sat	Sun
F.ma.	0	0	1	0	0	0	0
Pan.	0	0	0	0	1	0	0
PPx	0	0	0	0	0	0	0
NPx	0	0	1	0	0	0	0
Fd	0	1	1	1	1	0	0
WT.h.	0.0	2	4.8	10.3	8.05	0.0	0.0
Ulcv	0	0	0	0	0	0	0



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

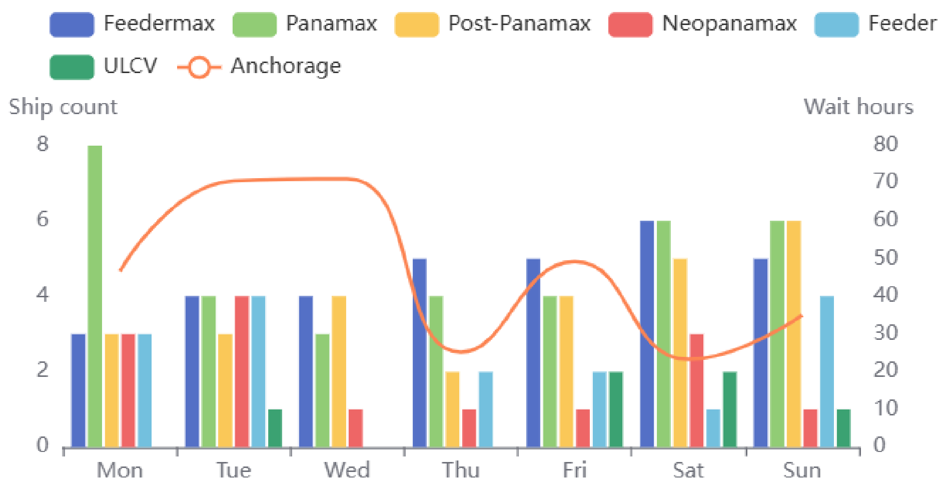
Type	M	T	W	Th	F	Sat	Sun
F.ma.	7	3	0	2	1	1	1
Pan.	1	2	2	4	7	3	5
PPx	1	0	3	4	2	2	0
NPx	1	0	1	2	2	2	2
Fd	3	2	5	3	3	11	13
Ulcv	0	0	0	0	0	0	0
WT.h.	9.9	24	12.6	16.6	29.8	31.1	34



最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

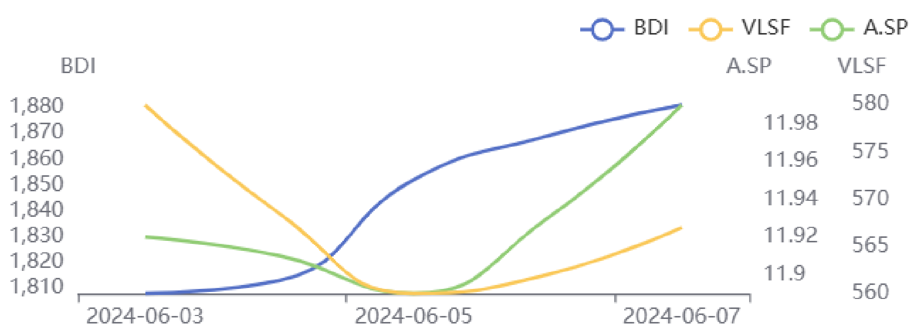
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

Type	M	T	W	Th	F	Sat	Sun
F.ma.	3	4	4	5	5	6	5
Pan.	8	4	3	4	4	6	6
PPx	3	3	4	2	4	5	6
NPx	3	4	1	1	1	3	1
Fd	3	4	0	2	2	1	4
Ulcv	0	1	0	0	2	2	1
WT.h.	46.6	70.6	71.2	25.2	49.2	23.3	35



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

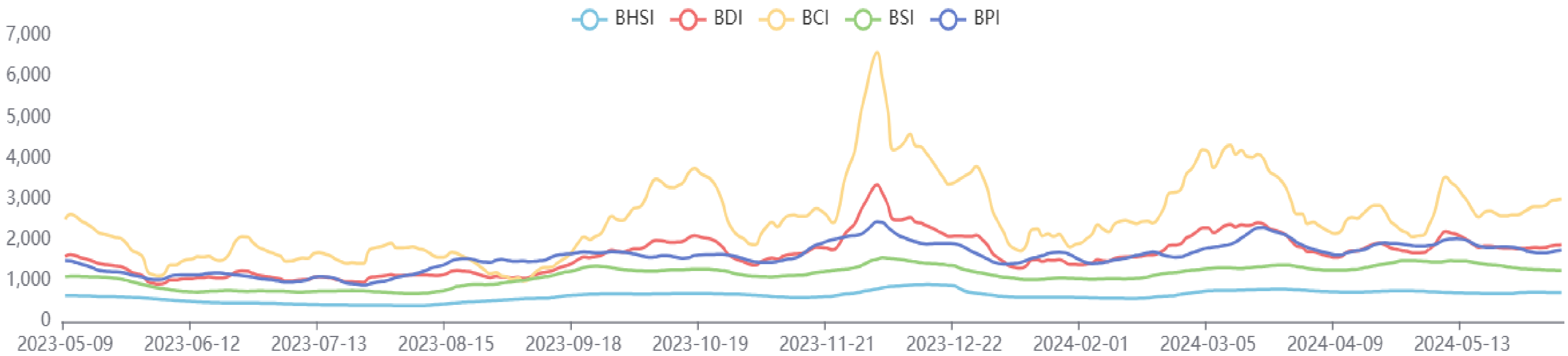
Type	M	T	W	Th	F	Sat	Sun
BDI	1681	1679	1702	1731	1750		
VLSF	580.00	568.50	560.00	562.00	567.00		
A.SP	11.92	11.91	11.89	11.93	11.99	11.95	



第三部分 航运市场 SHIPPING MARKET

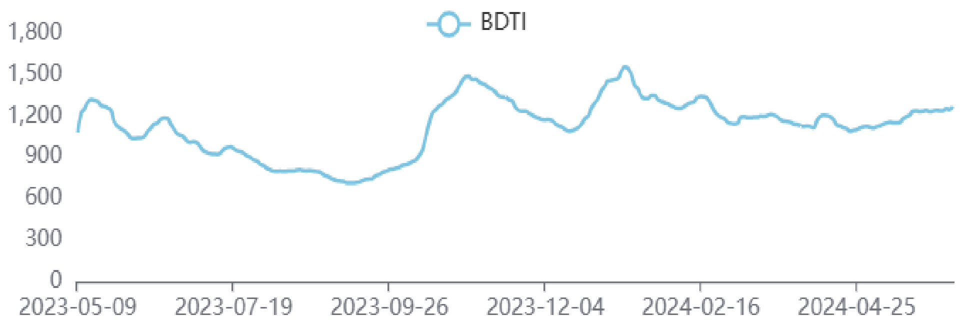
波罗的海干散货指数Baltic Dry Index

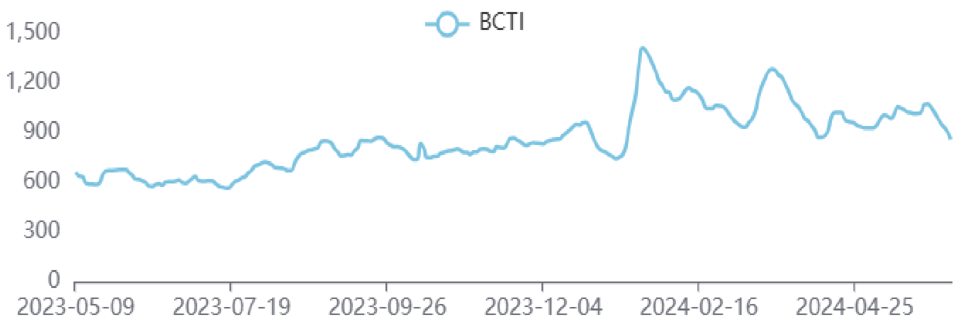
Type	PI	WoW	W%	M%	y%
BDI	1881	66.0	3.64	-11.65	84.41
BCI	2998	178.0	6.31	-8.93	116.15
BPI	1750	57.0	3.37	-13.62	53.64
BSI	1254	-24.0	-1.88	-15.56	63.71
BHSI	714	-6.0	-0.83	1.56	38.64

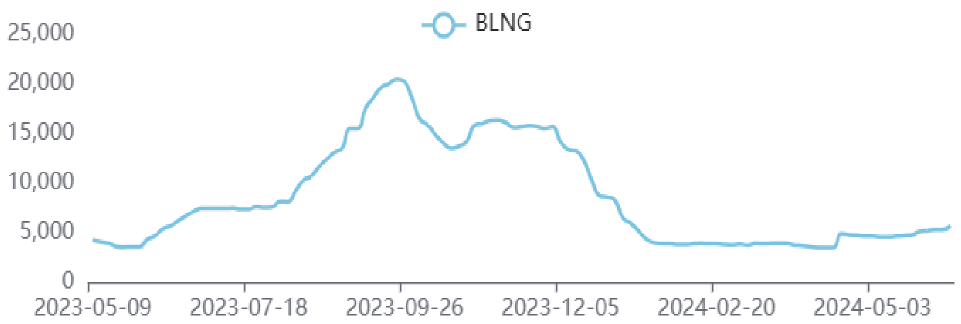


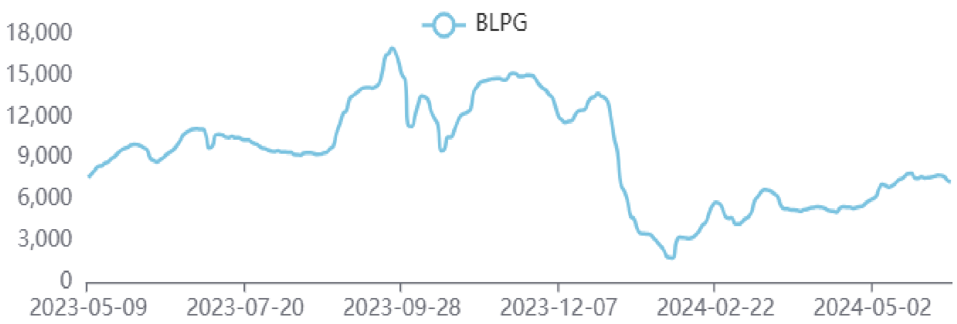
能源运价指数Energy Shipping Index

Type	PI	WoW	W%	M%	y%
BDTI	1267	26.0	2.1	9.7	21.94
BCTI	858	-165.0	-16.13	-13.86	38.83
BLNG	5666	383.0	7.25	24.04	5.89
BLPG	7265	-411.0	-5.35	5.63	-24.09

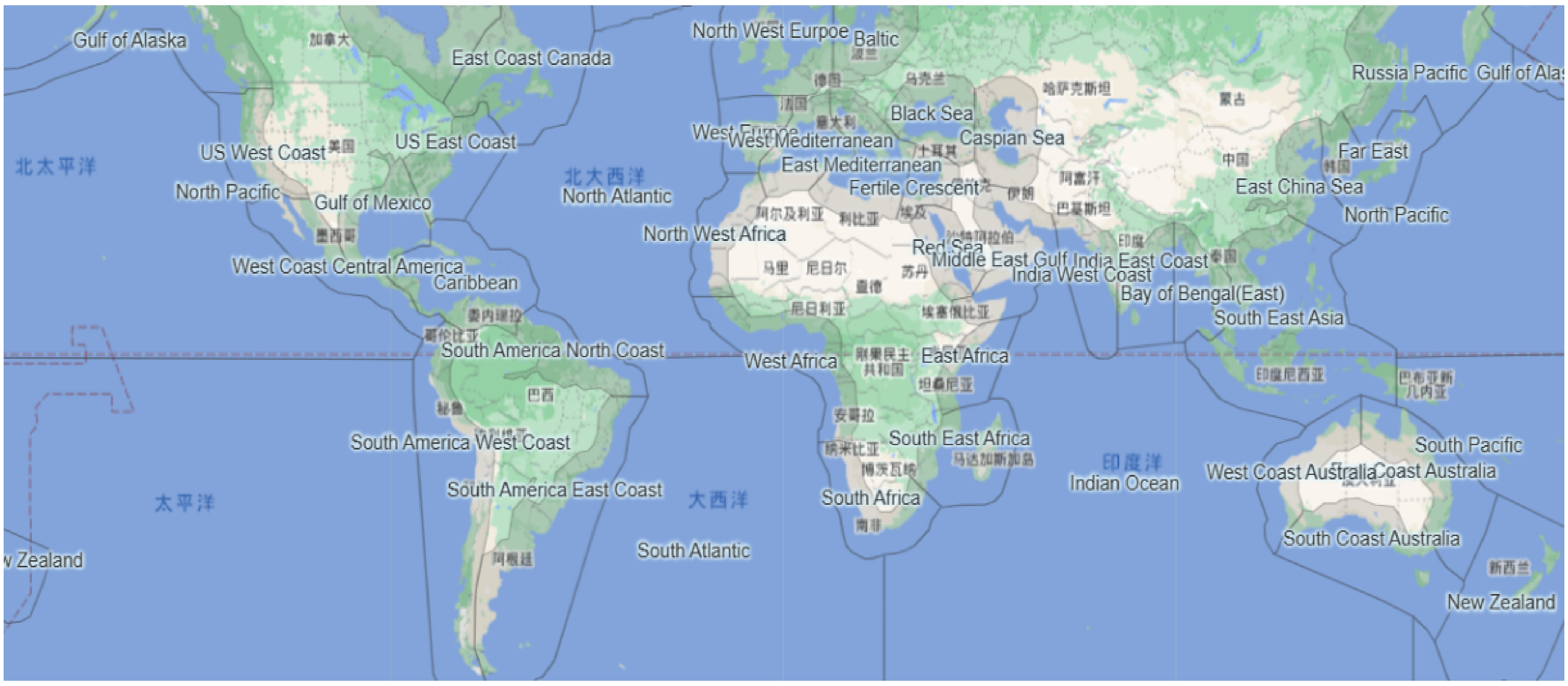








第四部分 运力分布 SUPPLY DISTRIBUTION

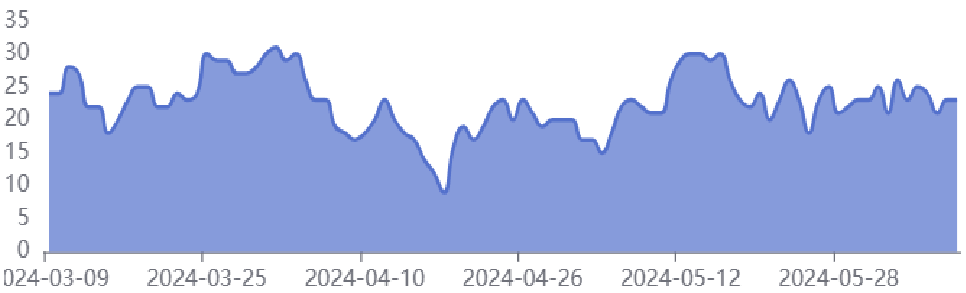


好望角型散货船 Capesize

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.

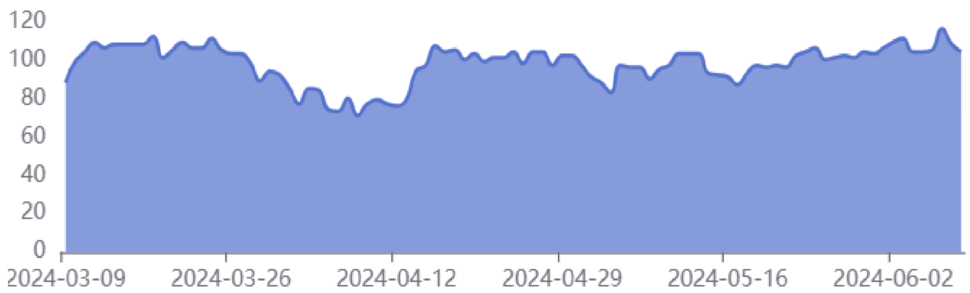
Type	M	T	W	Th	F	Sat	Sun
Cape	26	23	25	24	21	23	23



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.

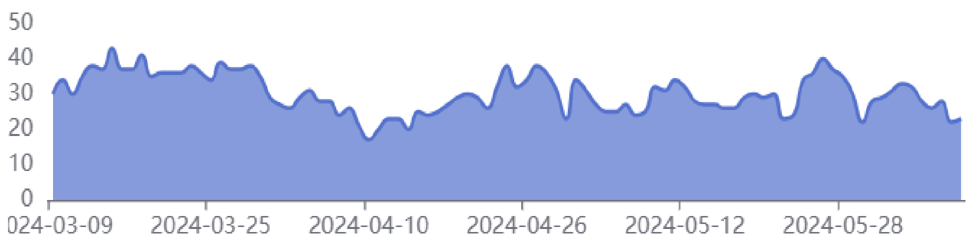
Type	M	T	W	Th	F	Sat	Sun
Cape	111	104	104	105	116	108	104



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	33	32	28	26	28	22	23

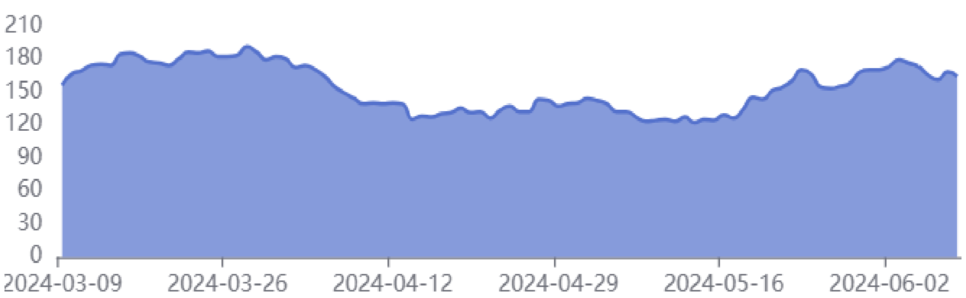


巴拿马型散货船 PANAMAX

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.

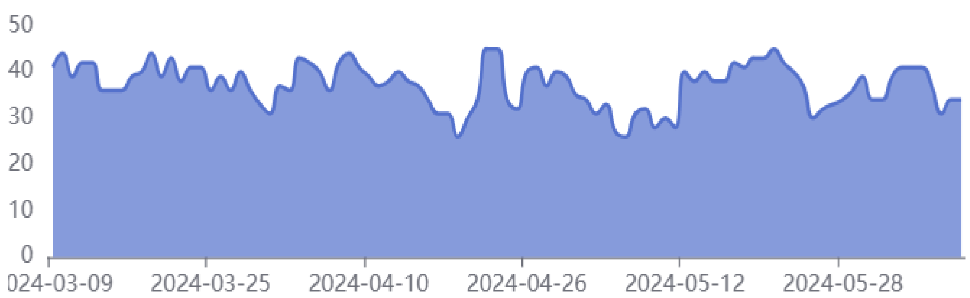
Type	M	T	W	Th	F	Sat	Sun
Pan.	179	176	173	165	161	168	164



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.

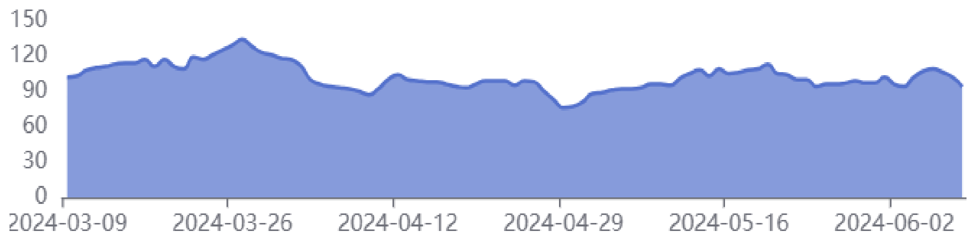
Type	M	T	W	Th	F	Sat	Sun
Pan.	29	30	29	27	26	23	24



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.	94	102	107	109	106	102	94

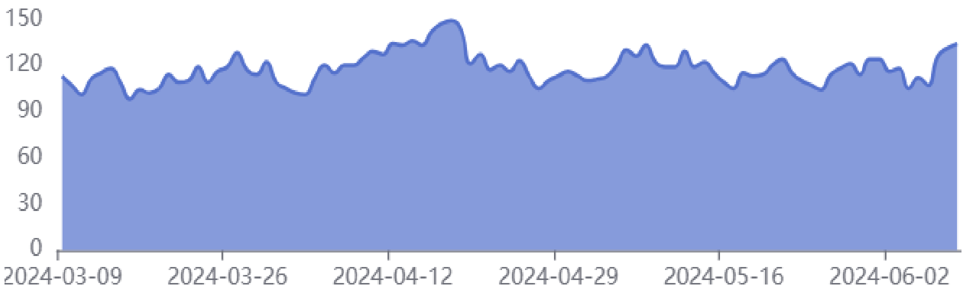


超大灵便型散货 SUPRAMAX

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.

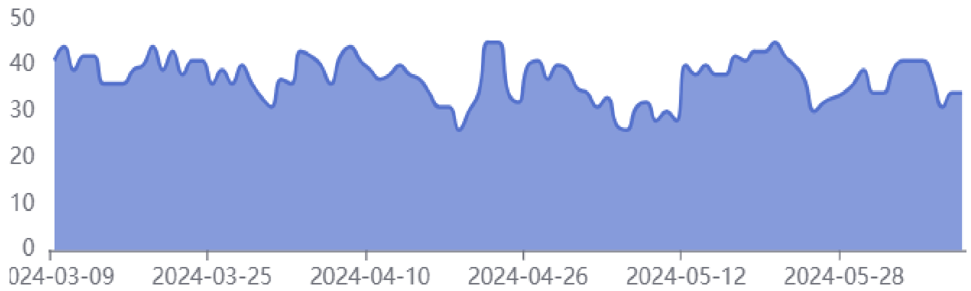
Type	M	T	W	Th	F	Sat	Sun
SMX	118	105	112	107	126	131	134



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.

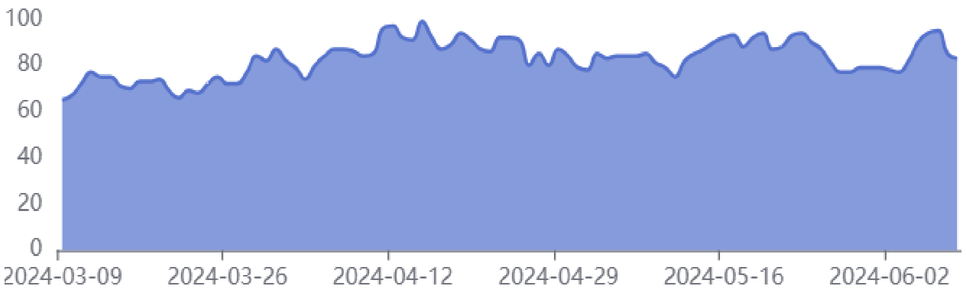
Type	M	T	W	Th	F	Sat	Sun
SMX	41	41	41	37	31	34	34



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.

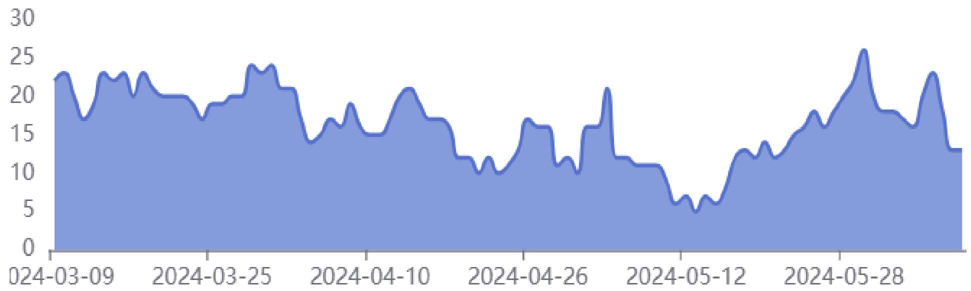
Type	M	T	W	Th	F	Sat	Sun
SMX	17	16	20	23	18	13	13



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.

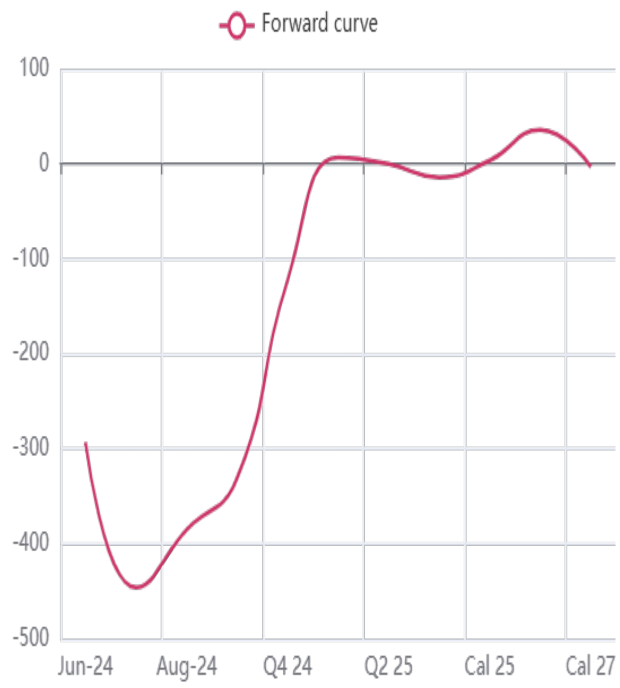
Type	M	T	W	Th	F	Sat	Sun
SMX	77	82	90	94	95	85	83



第五部分 远期运价协议 FFA

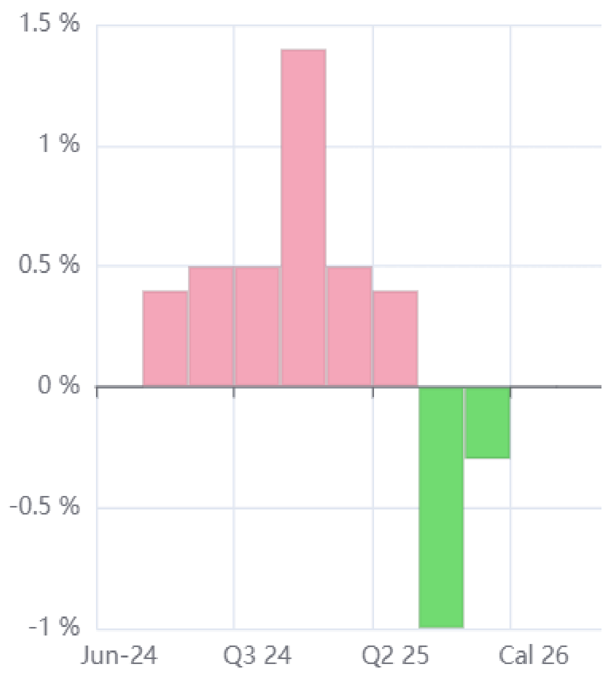
好望角型散货船Capesize

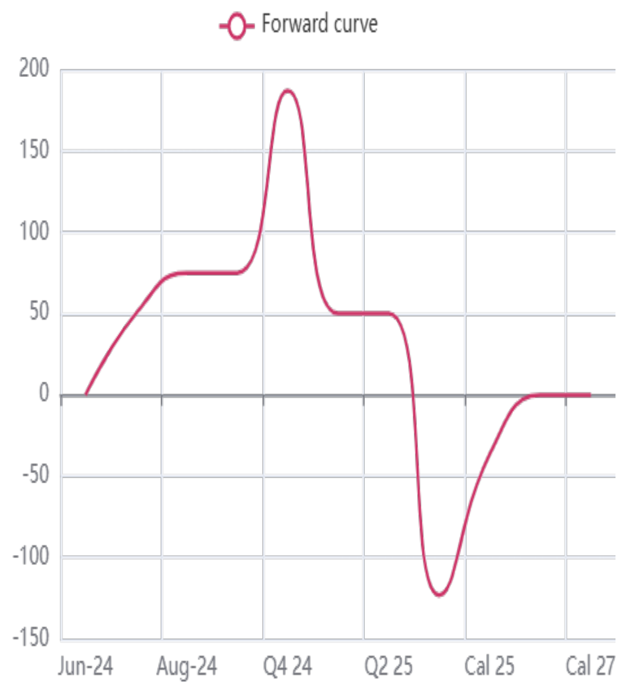
5TC	$/day	WoW	
Jun-24	25,350.00	-293.0	-1.1 %
Jul-24	24,543.00	-446.0	-1.8 %
Aug-24	24,829.00	-385.0	-1.5 %
Q3 24	25,028.67	-330.67	-1.3 %
Q4 24	26,771.00	-122.0	-0.5 %
Q1 25	15,550.00	7.0	0.0 %
Q2 25	20,886.00	0.0	0.0 %
Q3 25	23,857.00	-14.0	-0.1 %
Cal 25	21,055.50	3.75	0.0 %
Cal 26	20,257.00	36.0	0.2 %
Cal 27	19,261.00	-3.0	0.0 %



灵便型散货船Handysize

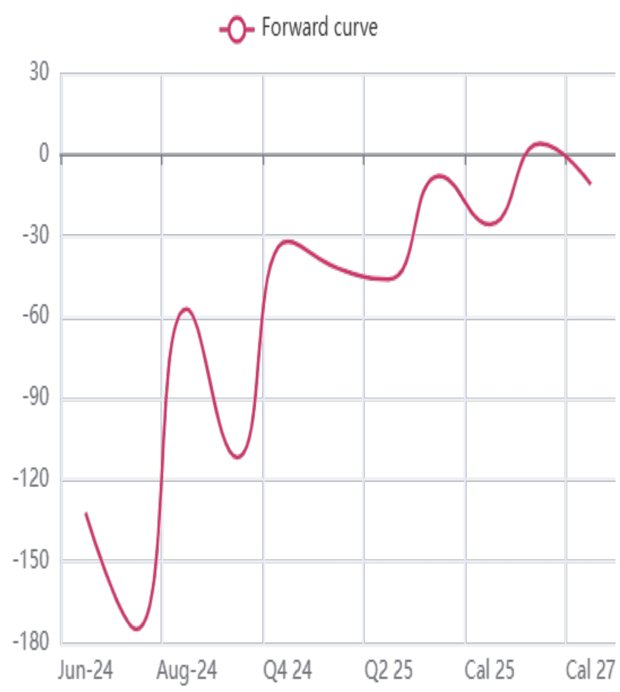
7TC	$/day	WoW	
Jun-24	13,450.00	0.0	0.0 %
Jul-24	13,863.00	50.0	0.4 %
Aug-24	13,988.00	75.0	0.5 %
Q3 24	13,946.33	75.0	0.5 %
Q4 24	13,925.00	187.0	1.4 %
Q1 25	10,938.00	50.0	0.5 %
Q2 25	12,425.00	50.0	50.0
Q3 25	11,995.00	-123.0	-1.0 %
Cal 25	11,838.25	-36.5	-0.3 %
Cal 26	11,550.00	0.0	0.0 %
Cal 27	11,475.00	0.0	0.0 %





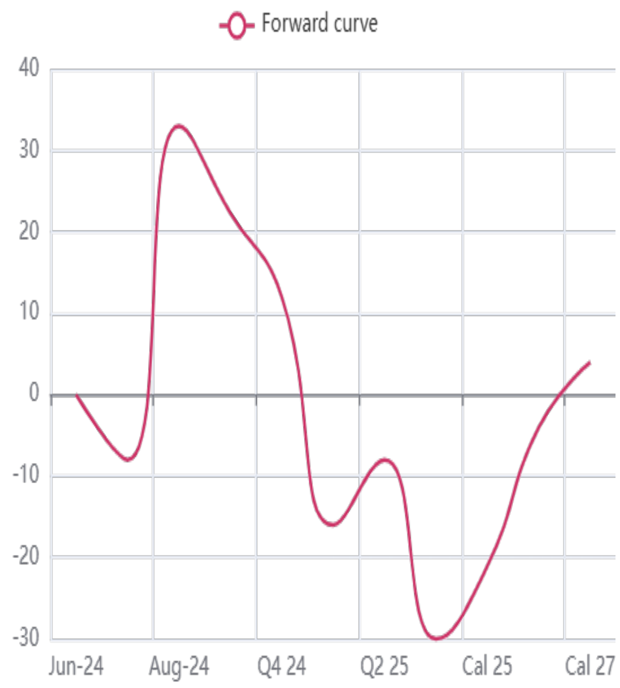
巴拿马型散货船Panamax

4TC	$/day	WoW	
Jun-24	15,200.00	-132.0	-0.9 %
Jul-24	15,518.00	-175.0	-1.1 %
Aug-24	15,593.00	-57.0	-0.4 %
Q3 24	15,565.67	-111.67	-0.7 %
Q4 24	15,043.00	-32.0	-0.2 %
Q1 25	12,479.00	-42.0	-0.3 %
Q2 25	14,050.00	-46.0	-0.3 %
Q3 25	13,746.00	-8.0	-0.1 %
Cal 25	13,407.25	-25.75	-0.2 %
Cal 26	12,504.00	4.0	0.0 %
Cal 27	12,289.00	-11.0	-0.1 %



超大灵便型散货船Supramax

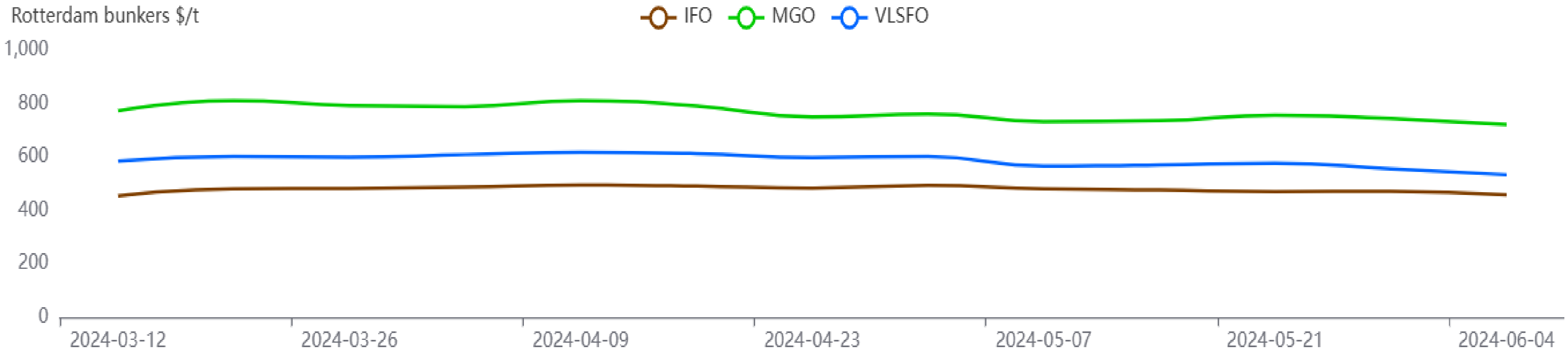
10TC	$/day	WoW	
Jun-24	14,375.00	0.0	0.0 %
Jul-24	15,046.00	-8.0	-0.1 %
Aug-24	15,225.00	33.0	0.2 %
Q3 24	15,179.33	22.33	0.1 %
Q4 24	14,679.00	12.0	0.1 %
Q1 25	11,867.00	-16.0	-0.1 %
Q2 25	13,392.00	-8.0	-0.1 %
Q3 25	13,187.00	-30.0	-0.2 %
12,908.25	Cal 25	-21.0	-0.2 %
Cal 26	12,296.00	-4.0	0.0 %
Cal 27	12,171.00	4.0	0.0 %

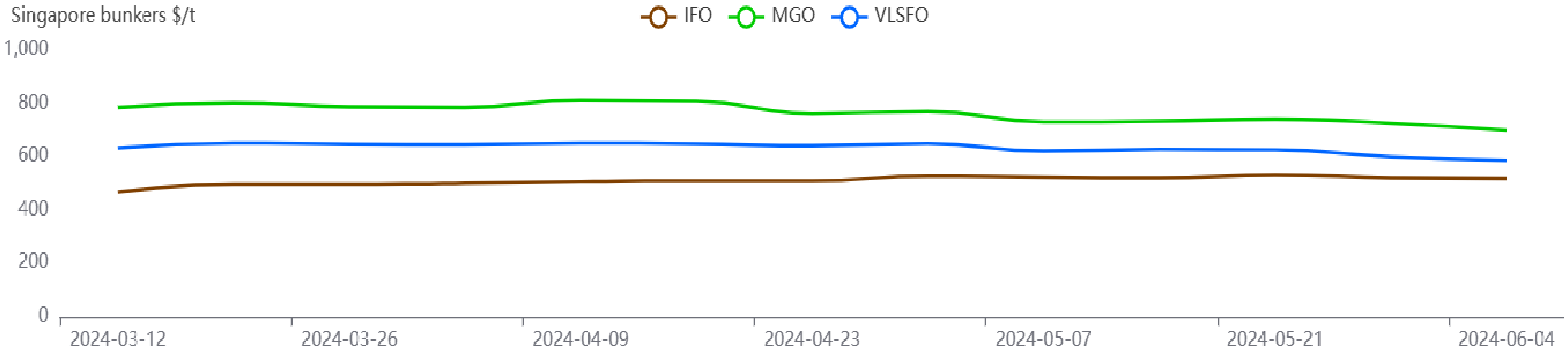


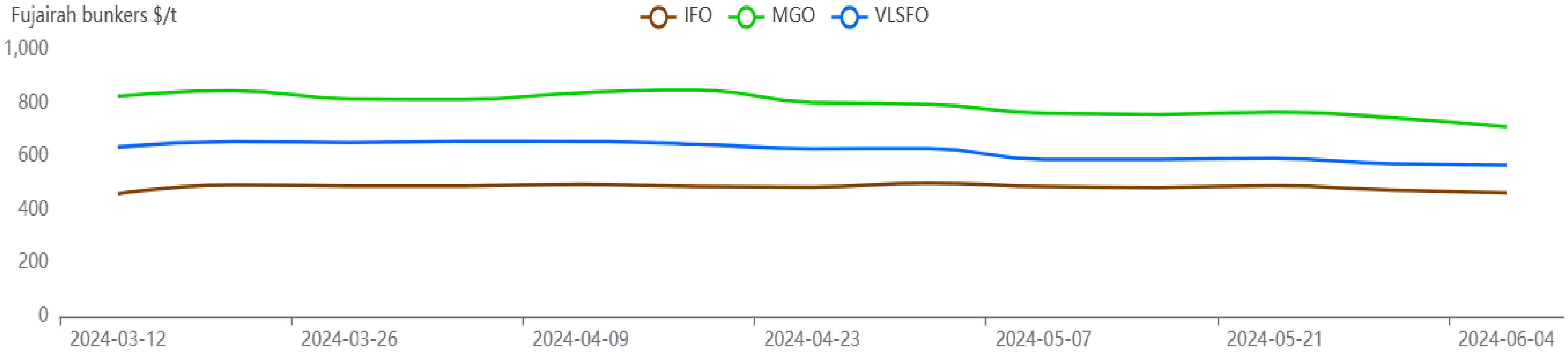
第六部分 燃油价格 BUNKER PRICE

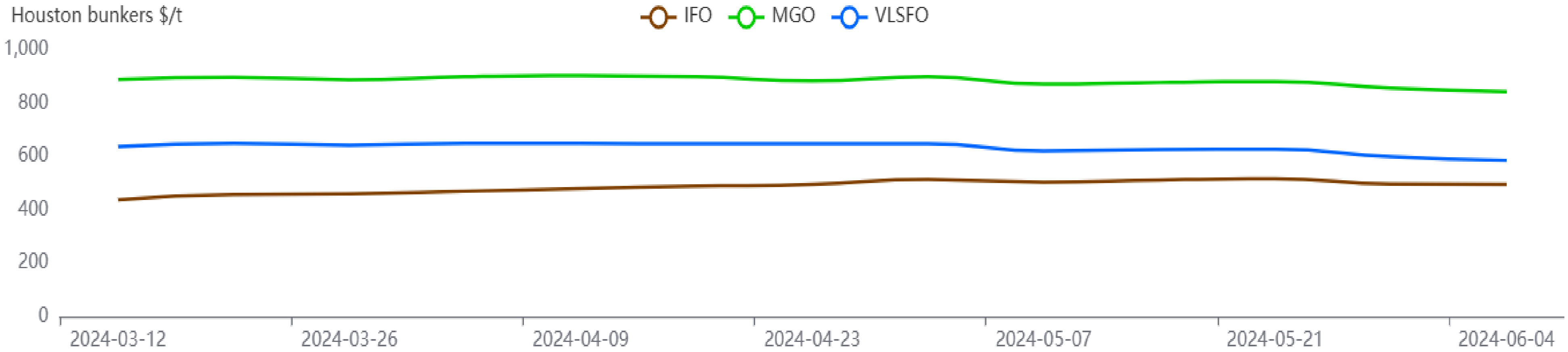
MP	LO	HO	MO	SP	WoW	W%	M%
zhoushan	592.5	547.0	755.0	45.5	-25.0	-35.46	-59.73
Singapore	585.5	517.0	698.5	68.5	-10.0	-12.74	-30.46
Rotterdam	534.0	458.5	723.0	75.5	-9.0	-10.65	-11.18
Fujairah	568.5	464.5	711.5	104.0	5.5	5.58	1.96
Houston	586.0	496.5	843.5	89.5	-12.5	-12.25	-23.18

(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	223.0		-6.0	-2.62	2.76	-6.98
Maize	210.0		-1.0	-0.47	-0.94	-18.48
Soybeans	232.0		-5.0	-2.11	-1.69	-8.2
Rice	258.0		1.0	0.39	4.45	25.32
Barley	228.0		-4.0	-1.72	3.17	-0.95
Energy		Index	+/-	Weekly	Monthly	YTD
Crude Oil	USD/Bbl	77.18	-0.79	-1.01	-0.36	6.22
Brent	USD/Bbl	81.31	-1.0	-1.21	-1.08	5.83
Natural Gas	USD/MMBtu	2.58	0.05	1.98	16.22	5.74
Gasoline	USD/Gal	2.42	-0.07	-2.81	-3.59	-9.7
Heating Oil	USD/Gal	2.39	-0.03	-1.24	-2.05	0.84
Ethanol	USD/Gal	1.82	0.02	1.11	3.41	-25.41
Naphtha	USD/T	662.1	0.33	0.05	-0.42	12.31
Propane	USD/Gal	0.7	-0.01	-1.41	1.45	7.69
Uranium	USD/Lbs	88.6	-3.05	-3.33	-3.96	65.3
Methanol	CNY/T	2635.0	-9.0	-0.34	0.27	26.26
TTF Gas	EUR/MWh	34.64	0.01	0.03	13.43	35.05
UK Gas	GBp/thm	82.95	1.13	1.38	10.76	44.61
Industrial		Index	+/-	Weekly	Monthly	YTD
Copper	USD/Lbs	4.6	-0.17	-3.56	1.1	25.68
Coal	USD/T	143.9	0.6	0.42	-1.84	-10.06
Steel	CNY/T	3519.0	-56.0	-1.57	-0.45	0.31
Iron Ore	USD/T	117.52	-0.14	-0.12	-1.71	15.22
Aluminum	USD/T	2652.5	-9.5	-0.36	4.66	18.55
Lithium	CNY/T	105500.0	0.0	0.0	-4.52	N/A
Metals		Index	+/-	Weekly	Monthly	YTD
Gold	USD/t.oz	2327.0	-11.6	-0.5	0.66	19.65
Silver	USD/t.oz	30.4	-0.4	-1.3	11.36	30.81
Platium	USD/t.oz	1044.3	-16.8	-1.58	5.81	1.61
Currencies	Index		+/-	Weekly	Monthly	YTD
EUR/USD	1.09		0.0	0.0	1.87	1.87
USD/CNY	7.24		0.0	0.0	0.14	2.12

第八部分 本周话题 WEEKLY TOPIC

2024年海岬型散货航运市场

2024年以来，海岬型散货航运市场逐步走出了过去两年的低迷，到目前该市场航运指数相比2023年整体上升了42%。

根据HiFleet船舶档案数据统计，当前海岬型船舶接近2000艘，合计3.8亿载重吨，平均船龄10.6年。因为近三年船舶拆解数量逐年减少，去年报道的拆解海岬型船舶只有6艘，导致该类型船队平均船龄逐渐老化。当前船龄在15年含以上的营运船舶数量有586艘，大概超过1亿载重吨，占整个海岬型散货船队的29.3%。未来三年，15年船龄含以上该类型船舶同比会大幅度增加，2025年将达到813艘，2026年达到991艘，2027年相比今年更是要增加83%达到1071艘。

过去两年新造船订单维持在130艘左右，两年间总计交付了106艘海岬型船舶，2024年到目前新造船订单已经接近120艘，截至5月底只交付了19艘。过去两年因为海岬型散货市场的疲软，该种船型订单处于平稳态势，到了2024年，随着该市场的持续攀升，海岬型新造船订单有明显增加，下半年海岬型船舶的交付将会加速，造船业或将面临较大的交付压力。

在需求方面，市场总有针对海岬型散货船舶的利好消息。一个是阿什伯顿矿山项目，是宝武集团连同合作伙伴澳大利亚矿产资源有限公司、韩国浦项钢铁公司、美国金属煤炭公司共同开发的铁矿项目，设计产能年产3000万吨。该项目于去年6月16日动工，今年6月1日凌晨首船已经出货，给澳大利亚海岬型航运市场带来近3%的增量。另外一个更大的项目是几内亚的锡芒杜山铁矿项目，该项目据推测在2025年开始将逐步消化市场超过150艘海岬型船舶。

海岬型船舶一方面面对老化的趋势，一方面面对市场带来的增量，而其新造船订单近年受到其它新造船订单的挤压，市场供给平衡的天平开始将向船东倾斜，未来该市场可能会表现亮眼，从而也会带动其它散货船型的攀升。

The Capesize Bulk Shipping Market in 2024

Since 2024, the Capesize bulk shipping market has gradually recovered from the downturn of the past two years, with the shipping index in this market currently up by 42% compared to 2023.

According to data from the HiFleet ship database, there are nearly 2000 Capesize vessels with a total capacity of 380 million deadweight tons and an average age of 10.6 years. Due to the decreasing number of vessels being scrapped in the past three years, only 6 Capesize vessels were reported to be scrapped last year, resulting in an aging average fleet age for this vessel type. Currently, there are 586 operating vessels with an age of 15 years and above, totalling approximately over 1 billion deadweight tons, representing 29.3% of the entire Capesize bulk carrier fleet. Over the next three years, the number of operating vessels of this type aged 15 years and above is expected to significantly increase, reaching 813 vessels in 2025, 991 vessels in 2026, and a notable 1071 vessels in 2027, representing an 83% increase compared to this year.

In the past two years, new ship orders have remained at around 130 vessels, with a total of 106 Capesize vessels delivered during this period. From 2024 to the present, nearly 120 new ship orders have been placed, with only 19 vessels delivered by the end of May. In the past two years, due to the sluggish Capesize bulk shipping market, orders for this type of vessel have remained stable. However, in 2024, with the market's continuous growth, there has been a noticeable increase in new orders for Capesize vessels, and deliveries of these vessels are expected to accelerate in the second half of the year, potentially putting significant pressure on the shipbuilding industry.

Regarding demand, the market continuously receives positive news related to Capesize bulk carriers. One notable project is the Ashburton Mining Project, a joint iron ore venture between Baowu Group, the Australian Mineral Resources Limited, POSCO from South Korea, and the American Metal Coal Company, with a designed annual capacity of 30 million tonnes iron ore. The project commenced on June 16th last year, with the first shipment departing on June 1st this year, bringing about an additional 3% to the Australian Capesize shipping market. Another significant project is the Simandou Mountain Iron Ore Project in Guinea, which is predicted to gradually engage over 150 Capesize vessels in the market starting in 2025.

Capesize vessels are facing both an aging trend and the incremental impact from the market. In recent years, new orders for these vessels have faced competition from orders for other vessel types, potentially tilting the balance of market supply towards shipowners. The near future outlook for this market appears promising, which may also stimulate the rise of other bulk carrier vessel types.