



2024年 第24周市场周报

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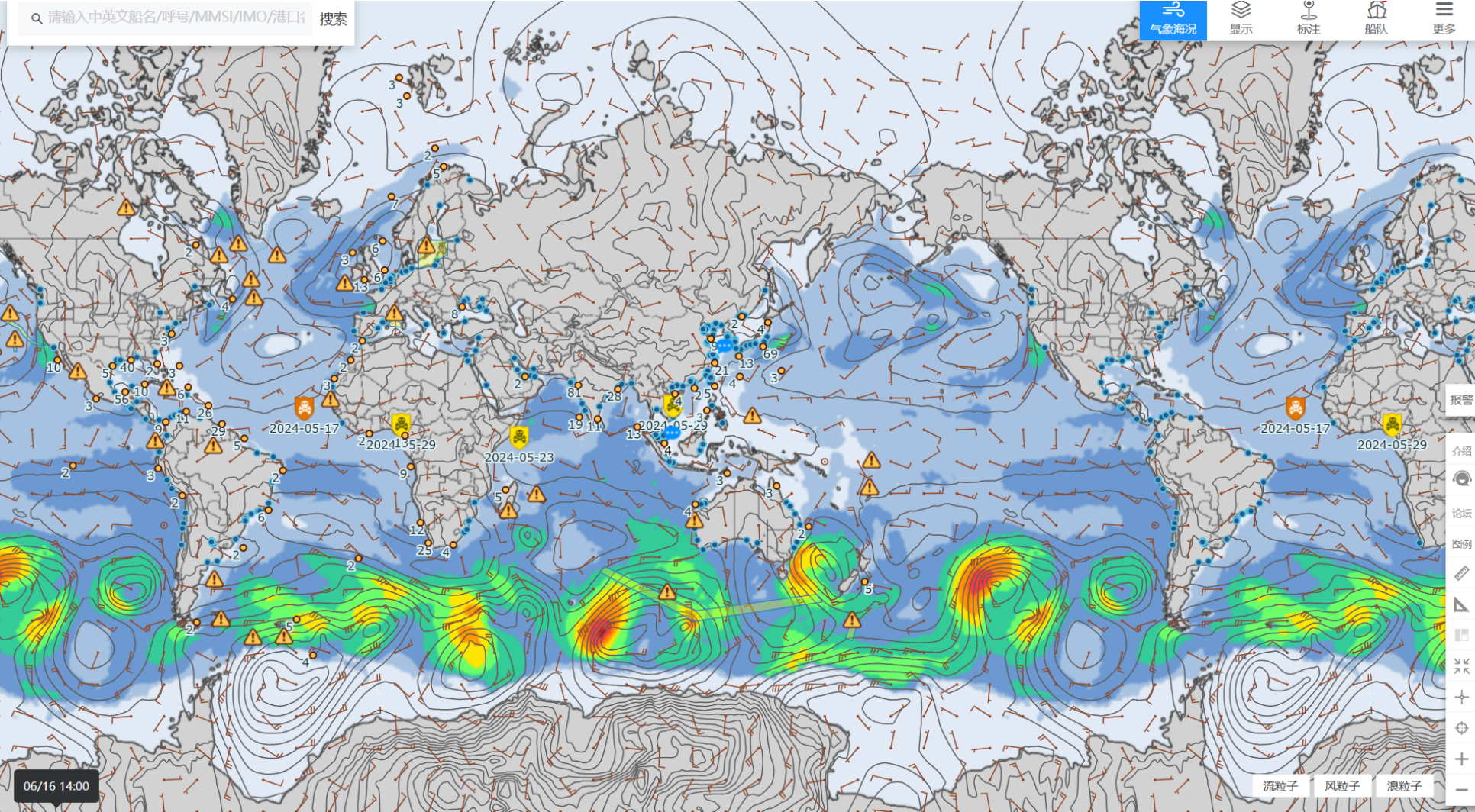
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最新商品价格 LATEST COMMODITIES PRICE

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816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 816 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、东海海域风力维持5-6级，相关海域海浪2米中浪；台湾海峡风力有时6级，台湾海峡洋面海浪可能有2米中浪，南海大部海域风力维持在4-5级，中浪。北半球大西洋和太平洋区域没有明显低压发展，海况平稳。The coming week the wind in Bohai Sea, Yellow Sea and China East Sea might stay breeze with moderate seas. The wind in the Taiwan Strait might experience strong breeze and the sea there happens to experience moderate. In most of the South China Sea the wind stays breeze with moderate seas. There is no notable low-pressure developing in the north of Atlantic and Pacific Ocean and the seas there are calm.

海盗事件 Piracy

2024年6月10号，新加坡海峡，四名持刀歹徒登上一艘正在航行的散货船，进入了机舱。值班轮机员注意到了歹徒并告知了值班轮机长。船舶报警并进行公共广播通知，歹徒逃离。全船进行了搜查，确认船舶发动机备件被盗。10.06.2024: 2035 UTC: Posn: 01:08.3N – 103:28.9E, Singapore Straits. Four robbers armed with knives boarded a bulk carrier underway and entered the engine room. Duty engineer noticed the robbers and informed the OOW. Alarm raised and PA announcement made, resulting in the robbers escaping. A search was made, and ship's engine spares were identified as stolen.

海上事件 Marine Incidents

6月13号周四，也门胡塞武装分子袭击了亚丁湾的一艘1万多载重吨的散货船，引发了一场火灾，一名船员严重烧伤，就在一天前，一艘希腊货轮在红海也遭遇致命袭击。On Thursday, 13th of June, Houthis rebels from Yemen attacked a bulk carrier with about 11400 DWT in the Aden Gulf, causing a fire that resulted in severe burns to one crew member. Just a day earlier, a Greek cargo ship was also hit by a deadly attack in the Red Sea.

其它 Others

没有 Nil

备注 Remark

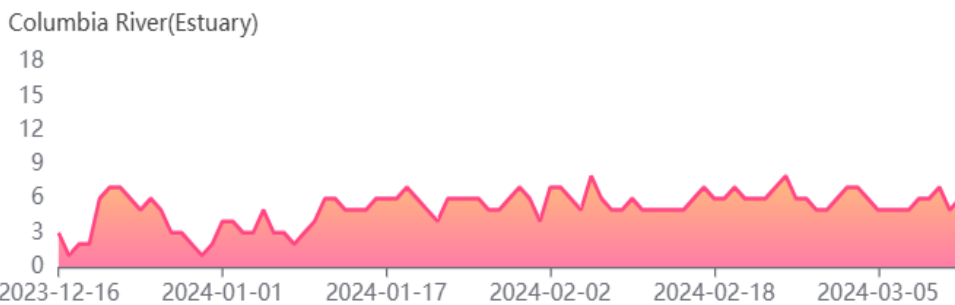
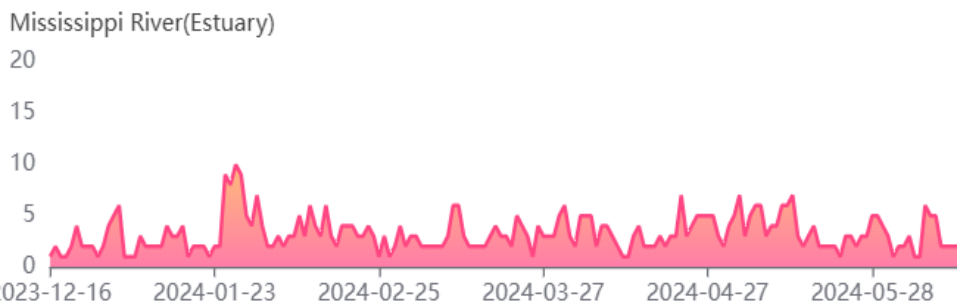
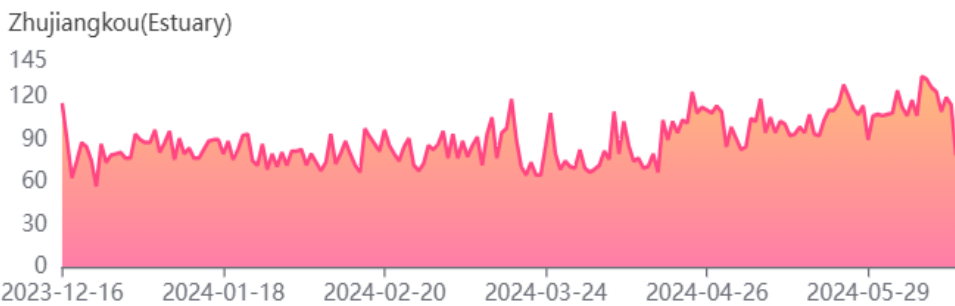
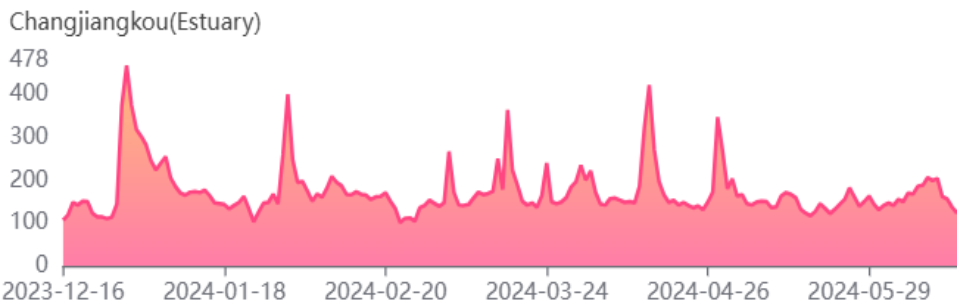
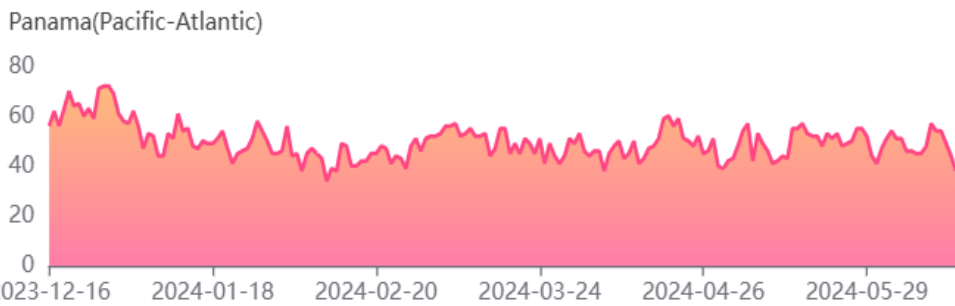
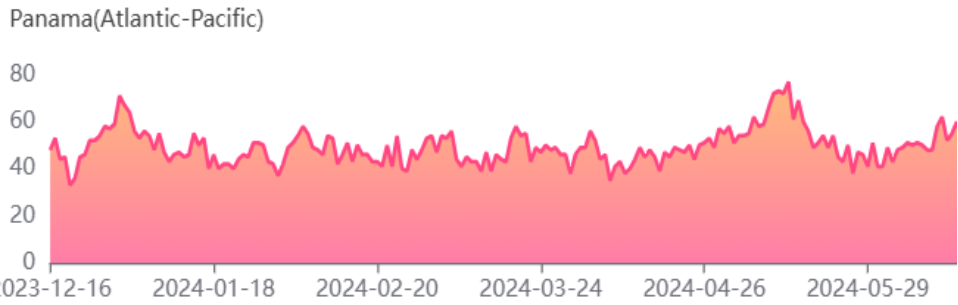
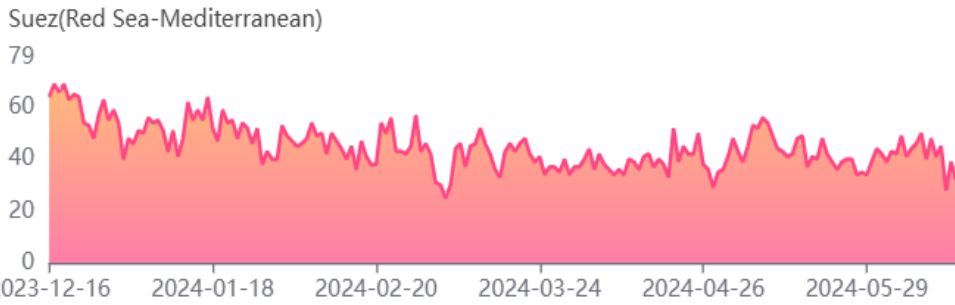
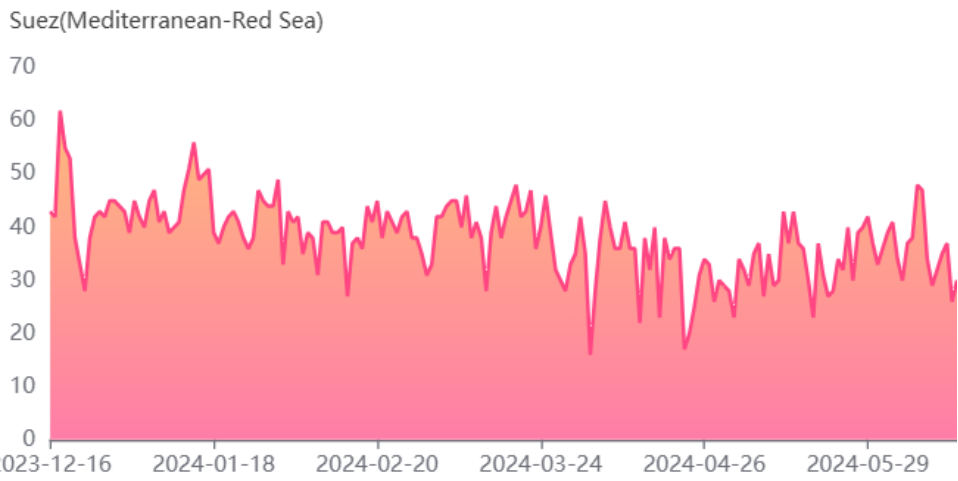
本报告数据截止时间为2024年6月16日北京时间17点；所有数据和或观点仅供参考，在任何情况下本公司及其员工不承担任何风险。 The data deadline for this report is Beijing time 17 hours on June 16th of 2024; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

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	32	1179	-31	-78
Miss.Riv.	2	72	16	-52
CJK	123	4535	70	-124
Pa.Atlan.	60	1425	42	-236
Colum.Riv.	4	117	-16	-33
Suez.Med.	30	1023	-44	117
Pa.Pac.	38	1431	0	22
ZJK	79	3261	21	319

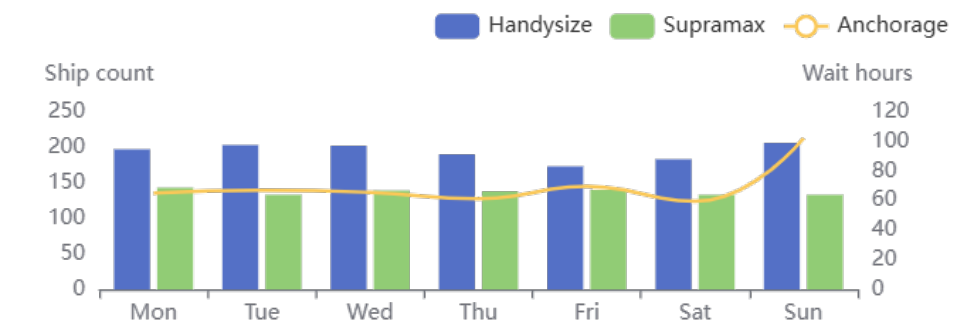


(P.N-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

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

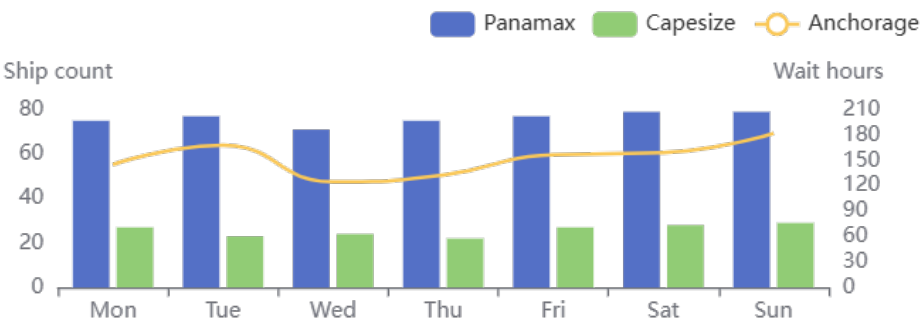
Type	M	T	W	Th	F	Sat	Sun
HDY	197	203	202	190	173	183	206
SMX	143	133	139	138	140	133	133
WT.h.	65.1	67	65.5	61.2	69.5	59.5	102



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

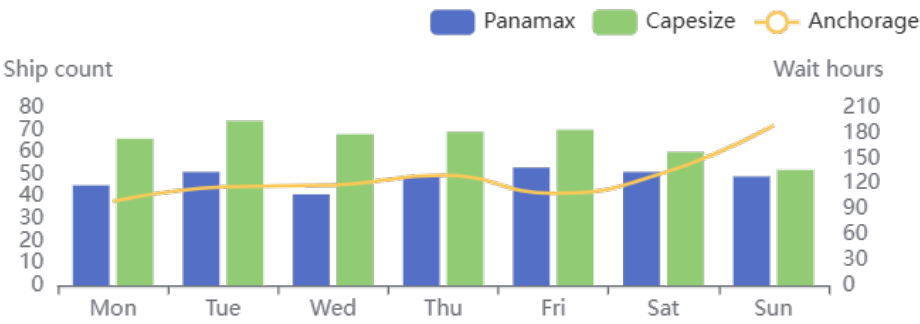
Type	M	T	W	Th	F	Sat	Sun
Pan.	75	77	71	75	77	79	79
Cap	27	23	24	22	27	28	29
WT.h.	145.4	167.9	124.6	132.8	156.8	159.3	182



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

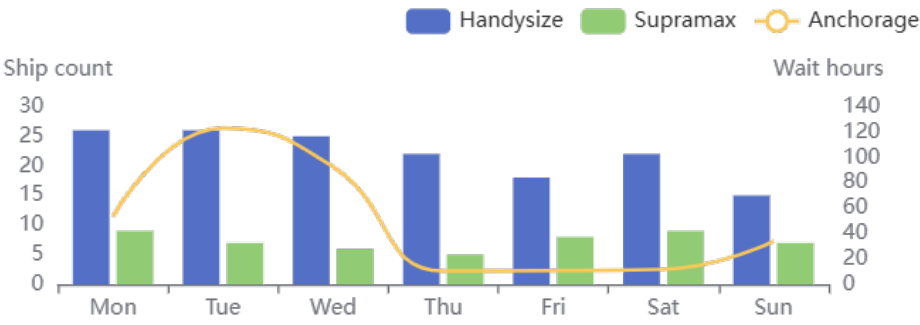
Type	M	T	W	Th	F	Sat	Sun
Pan.	45	51	41	49	53	51	49
Cap	66	74	68	69	70	60	52
WT.h.	99.1	116.3	118.5	130.3	108.9	132.9	189



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

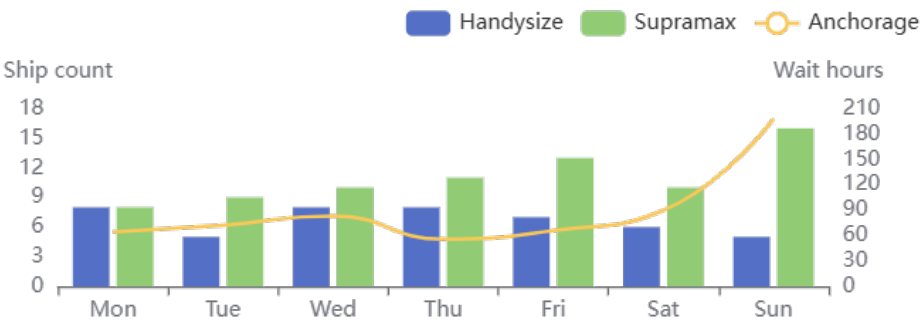
Type	M	T	W	Th	F	Sat	Sun
HDY	26	26	25	22	18	22	15
SMX	9	7	6	5	8	9	7
WT.h.	53.7	123.1	92.6	10.6	10.8	11.9	34



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

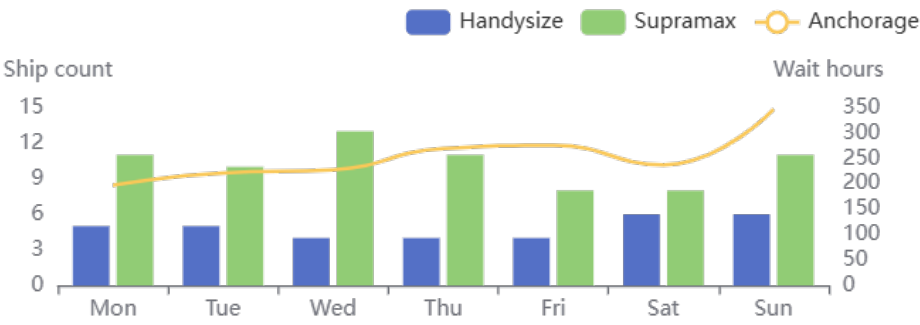
Type	M	T	W	Th	F	Sat	Sun
HDY	8	5	8	8	7	6	5
SMX	8	9	10	11	13	10	16
WT.h.	64.2	72.3	83.35	55.8	65.95	89.95	198



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

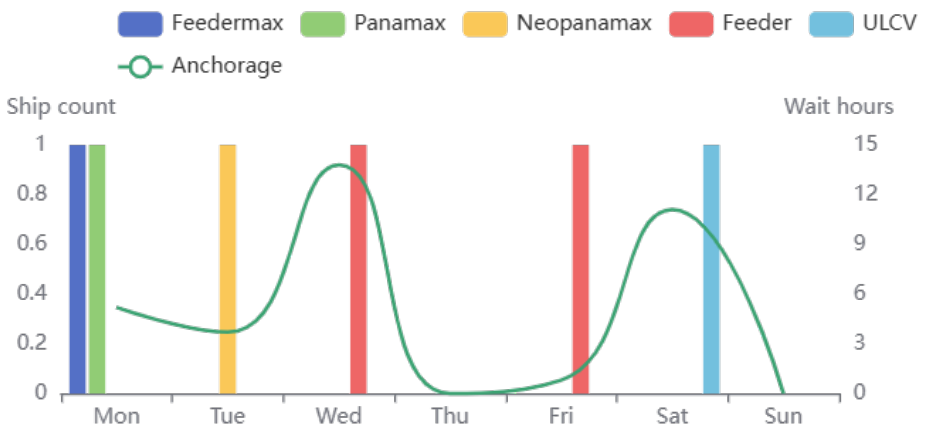
Type	M	T	W	Th	F	Sat	Sun
HDY	5	5	4	4	4	6	6
SMX	11	10	13	11	8	8	11
WT.h.	197.5	221.5	227.7	269.5	275.7	237.45	347



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

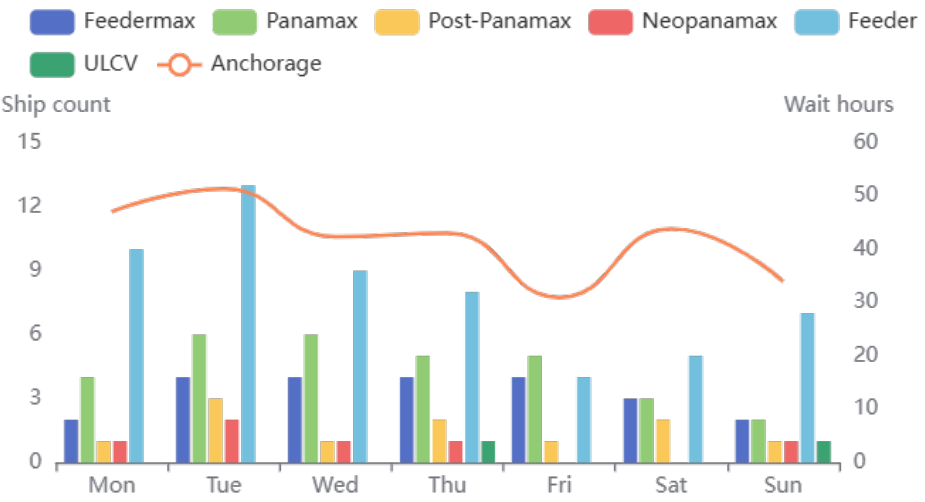
Type	M	T	W	Th	F	Sat	Sun
F.ma.	1	0	0	0	0	0	0
Pan.	1	0	0	0	0	0	0
PPx	0	0	0	0	0	0	0
NPx	0	1	0	0	0	0	0
Fd	0	0	1	0	1	0	0
WT.h.	5.2	3.7	13.8	0.0	0.8	11.1	0.0
Ulc v	0	0	0	0	0	1	0



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

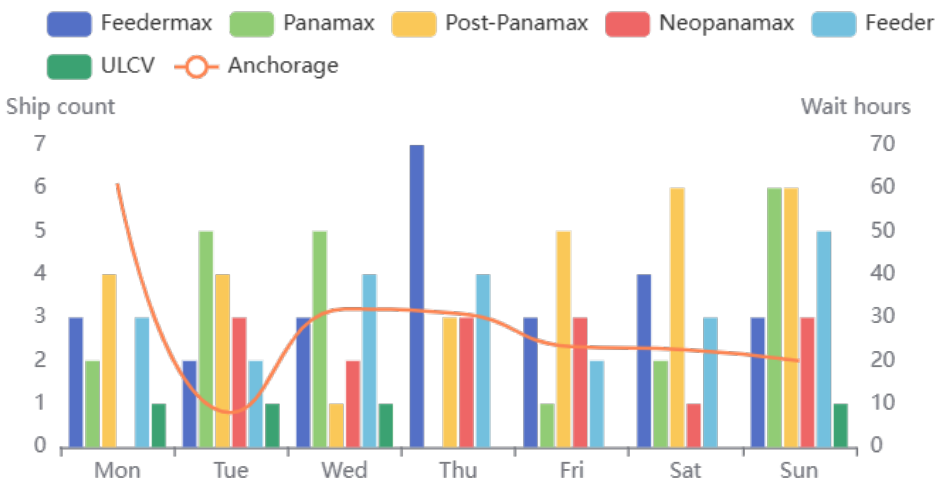
Type	M	T	W	Th	F	Sat	Sun
F.ma.	2	4	4	4	4	3	2
Pan.	4	6	6	5	5	3	2
PPx	1	3	1	2	1	2	1
NPx	1	2	1	1	0	0	1
Fd	10	13	9	8	4	5	7
Ulc v	0	0	0	1	0	0	1
WT.h.	47.1	51.4	42.4	43.1	31	43.9	34



最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

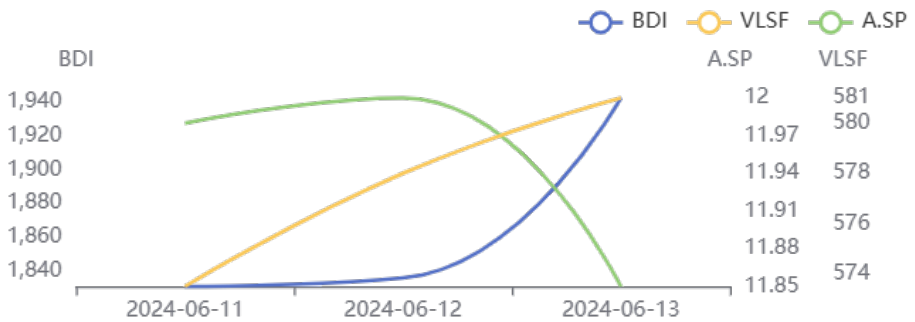
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

Type	M	T	W	Th	F	Sat	Sun
F.ma.	3	2	3	7	3	4	3
Pan.	2	5	5	0	1	2	6
PPx	4	4	1	3	5	6	6
NPx	0	3	2	3	3	1	3
Fd	3	2	4	4	2	3	5
Ulc v	1	1	1	0	0	0	1
WT.h.	61.1	8	32	31	23.3	22.6	20



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

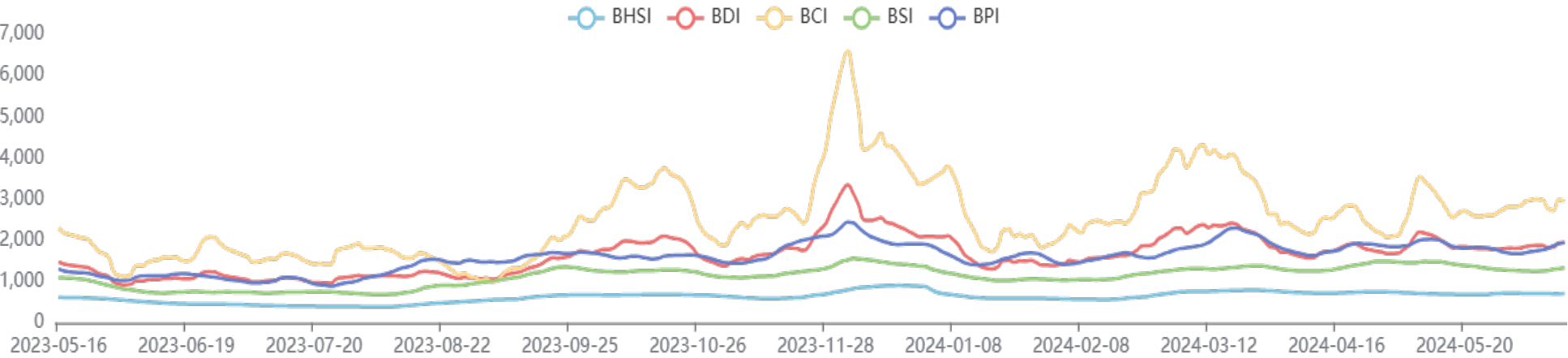
Type	M	T	W	Th	F	Sat	Sun
BDI	1801	1864	1920	1950			
VLSF	566.50	573.50	578.00	581.00			
A.SP	11.94	11.98	12.0	11.85	11.91	11.86	



第三部分 航运市场 SHIPPING MARKET

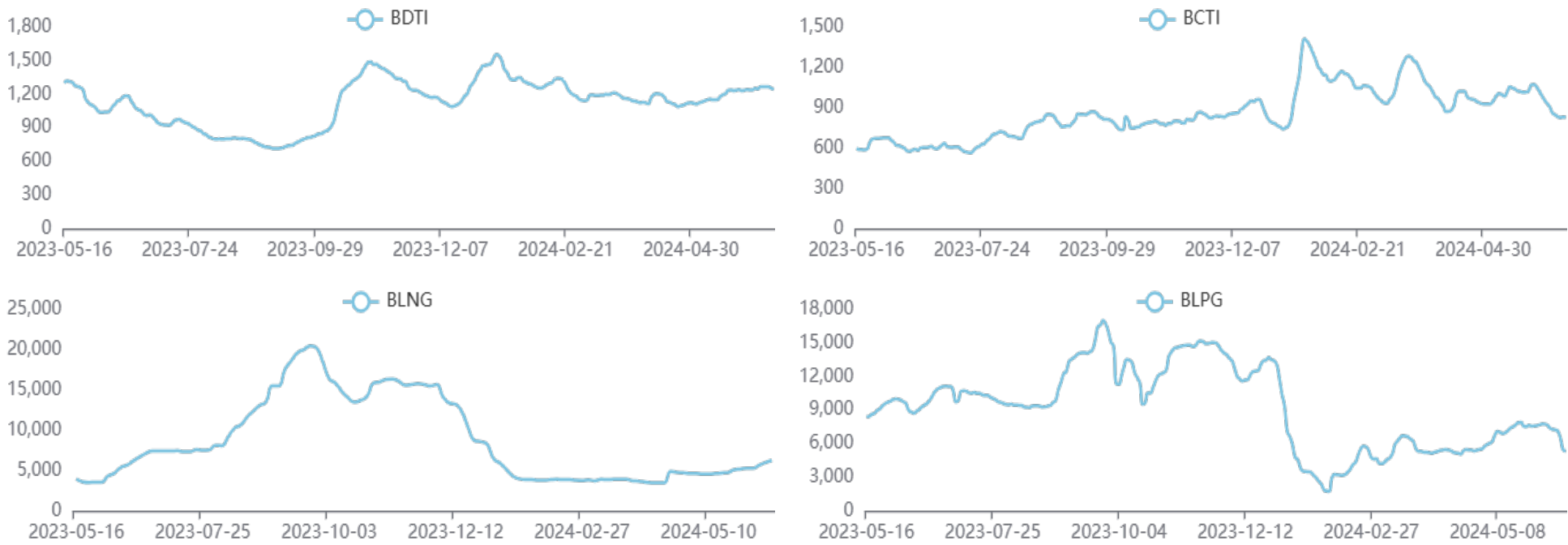
波罗的海干散货指数Baltic Dry Index

Type	PI	WoW	W%	M%	y%
BDI	1948	67.0	3.56	5.64	80.54
BCI	2957	-41.0	-1.37	10.54	87.15
BPI	1950	200.0	11.43	6.85	67.67
BSI	1335	81.0	6.46	-4.98	83.13
BHSI	711	-3.0	-0.42	3.04	49.37



能源运价指数Energy Shipping Index

Type	PI	WoW	W%	M%	y%
BDTI	1240	-27.0	-2.13	3.77	8.77
BCTI	828	-30.0	-3.5	-20.08	44.25
BLNG	6257	591.0	10.43	33.55	1.3
BLPG	5333	-1932.0	-26.59	-30.7	-40.99



第四部分 运力分布 SUPPLY DISTRIBUTION

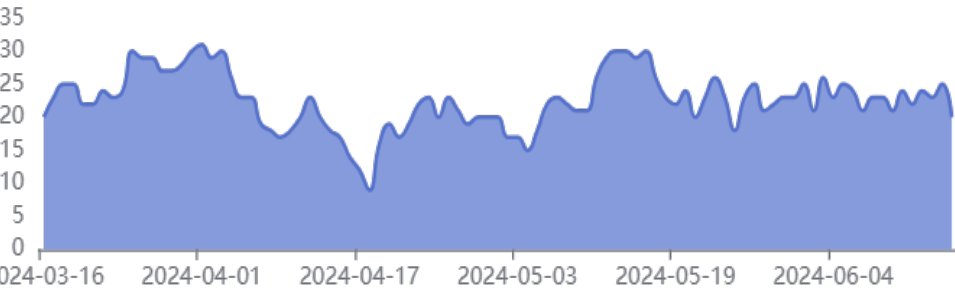


好望角型散货船 Capesize

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	21	24	22	24	23	25	20



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.

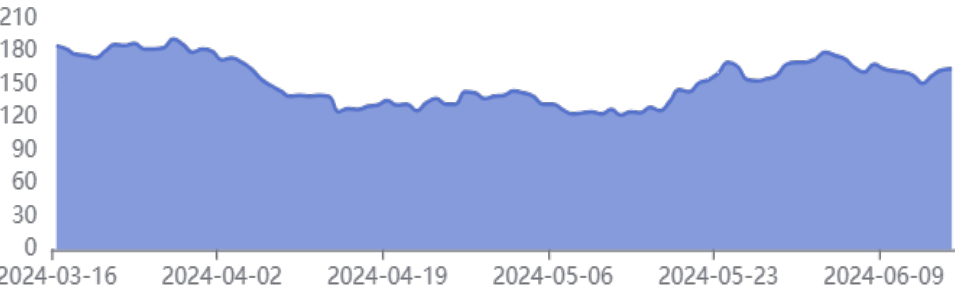
Type	M	T	W	Th	F	Sat	Sun
Cape	26	23	29	27	27	25	24

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.

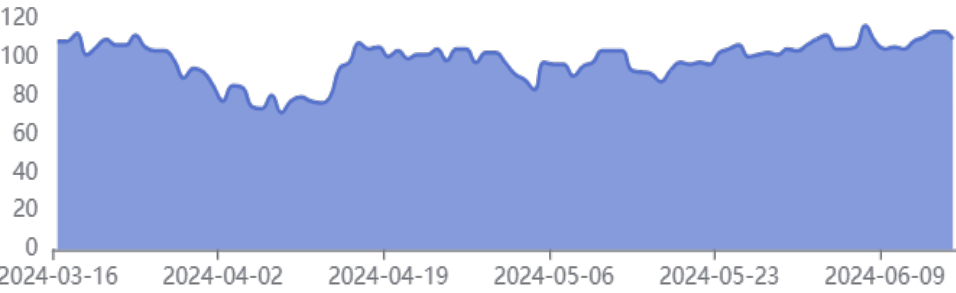
Type	M	T	W	Th	F	Sat	Sun
Pan.	162	161	158	151	158	163	164



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.

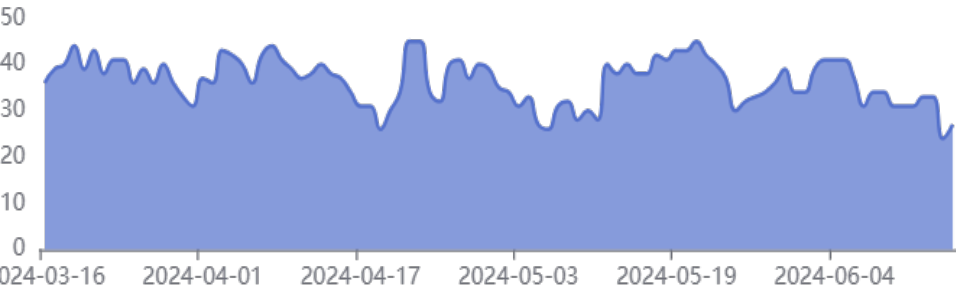
Type	M	T	W	Th	F	Sat	Sun
Cape	105	104	108	110	113	113	109



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.

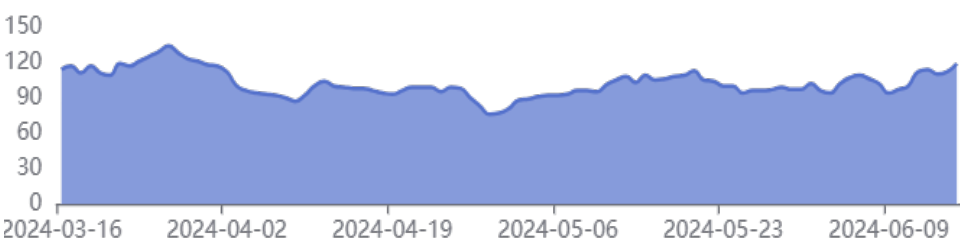
Type	M	T	W	Th	F	Sat	Sun
Pan.	23	20	22	19	19	18	19



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.	97	100	112	114	110	112	119

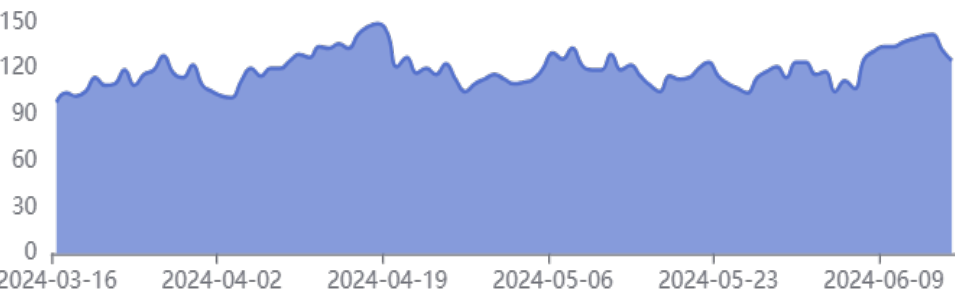


超大灵便型散货 SUPRAMAX

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.

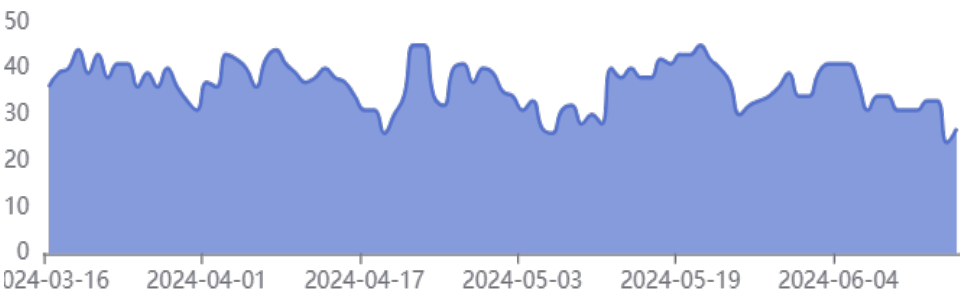
Type	M	T	W	Th	F	Sat	Sun
SMX	134	137	139	141	142	132	125



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.

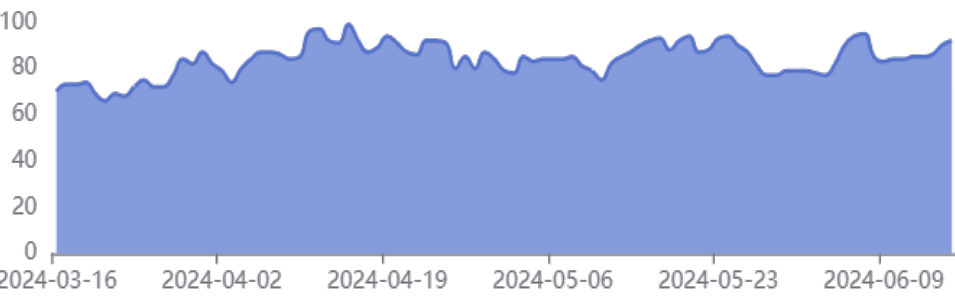
Type	M	T	W	Th	F	Sat	Sun
SMX	31	31	31	33	33	24	27



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.

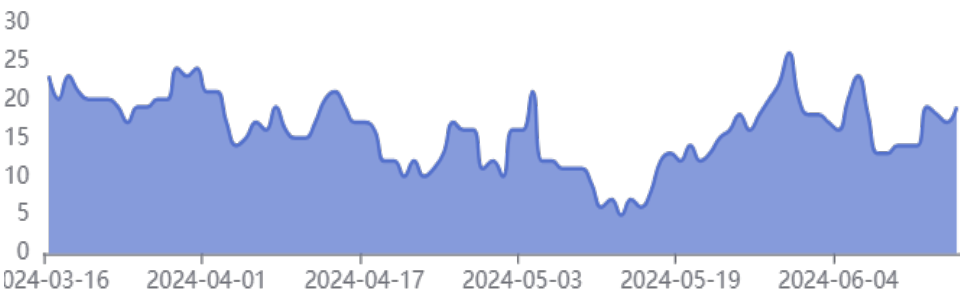
Type	M	T	W	Th	F	Sat	Sun
SMX	14	14	14	19	18	17	19



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.

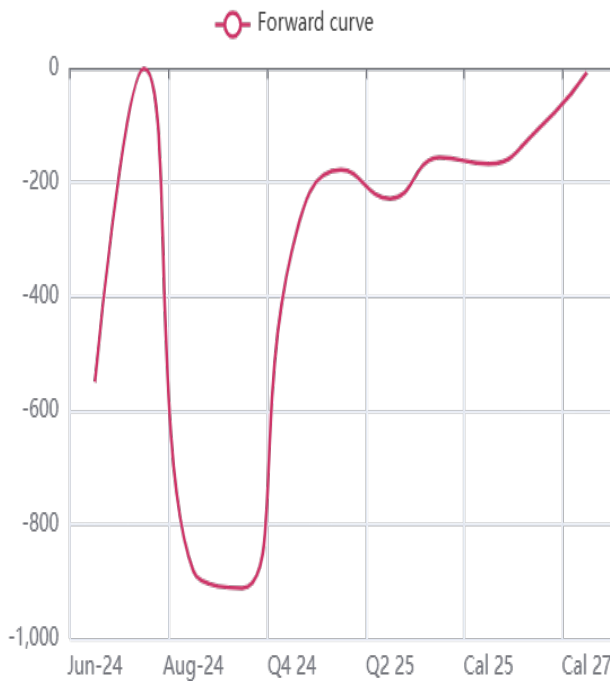
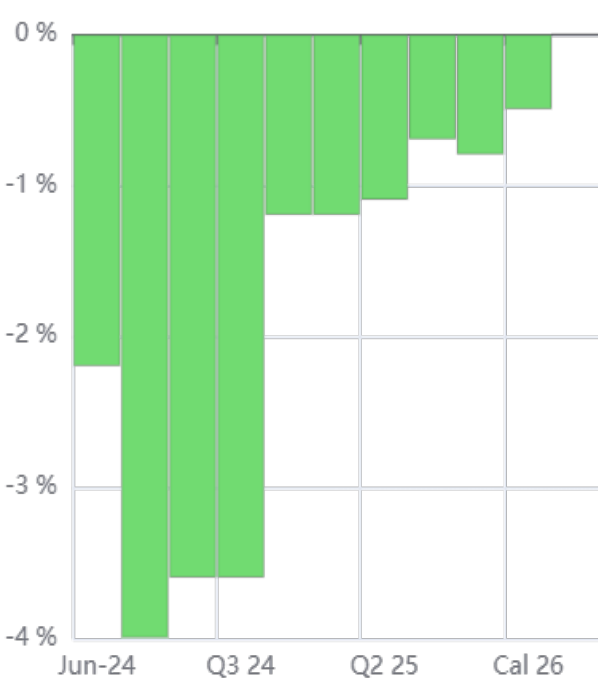
Type	M	T	W	Th	F	Sat	Sun
SMX	84	84	85	85	86	90	92



第五部分 远期运价协议 FFA

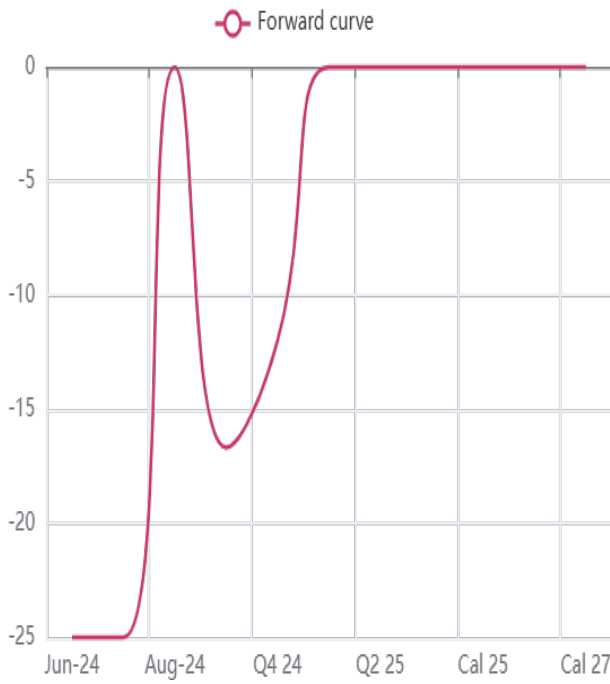
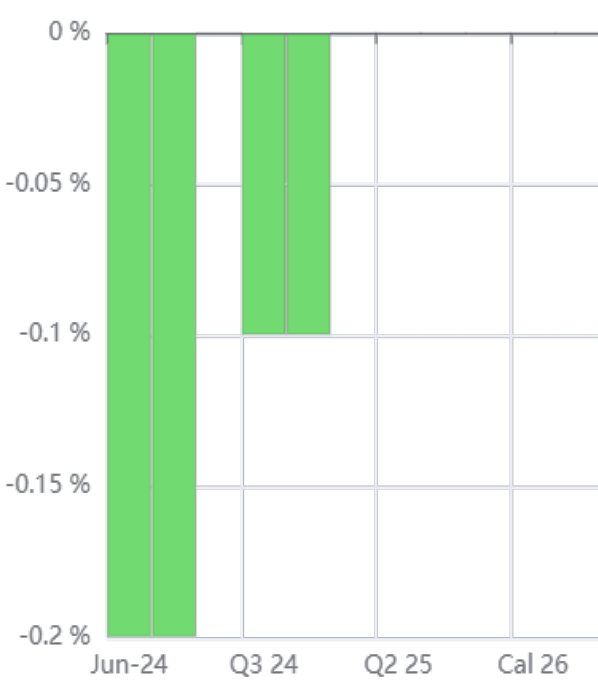
好望角型散货船Capesize

5TC	\$/day	WoW	
Jun-24	24,804.00	-550.0	-2.2 %
Jul-24	24,129.00	-1003.0	-4.0 %
Aug-24	23,829.00	-882.0	-3.6 %
Q3 24	24,105.00	-911.67	-3.6 %
Q4 24	25,989.00	-322.0	-1.2 %
Q1 25	15,186.00	-178.0	-1.2 %
Q2 25	20,600.00	-229.0	-1.1 %
Q3 25	23,686.00	-157.0	-0.7 %
Cal 25	20,837.75	-167.75	-0.8 %
Cal 26	20,071.00	-108.0	-0.5 %
Cal 27	19,246.00	-8.0	0.0 %



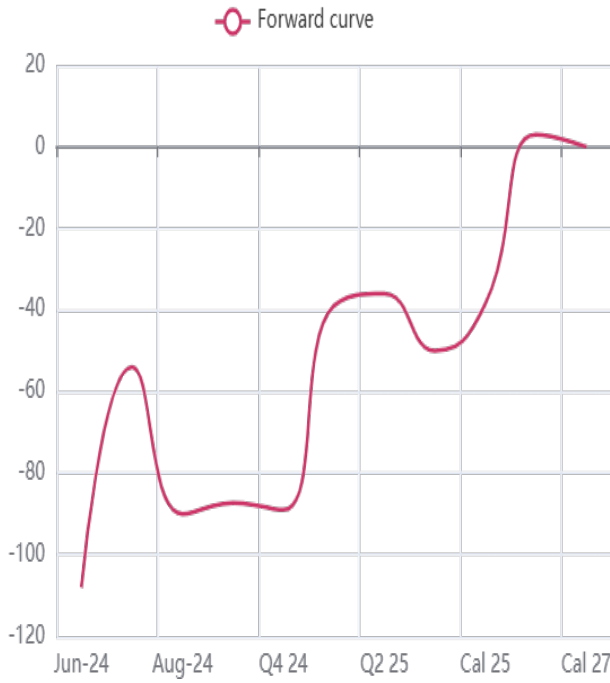
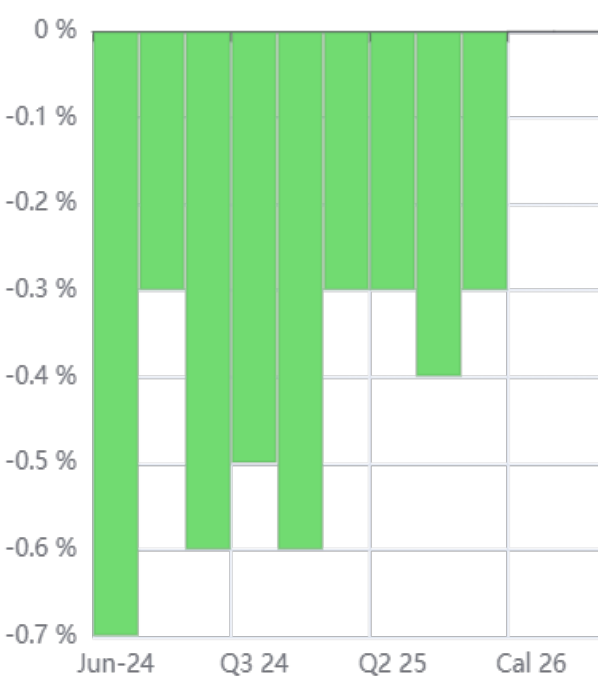
灵便型散货船Handysize

7TC	\$/day	WoW	
Jun-24	13,188.00	-25.0	-0.2 %
Jul-24	13,938.00	-25.0	-0.2 %
Aug-24	13,900.00	0.0	0.0 %
Q3 24	13,867.00	-16.67	-0.1 %
Q4 24	13,963.00	-12.0	-0.1 %
Q1 25	10,825.00	0.0	0.0 %
Q2 25	12,388.00	0.0	0.0
Q3 25	12,143.00	0.0	0.0 %
Cal 25	11,874.75	0.0	0.0 %
Cal 26	11,625.00	0.0	0.0 %
Cal 27	11,488.00	0.0	0.0 %



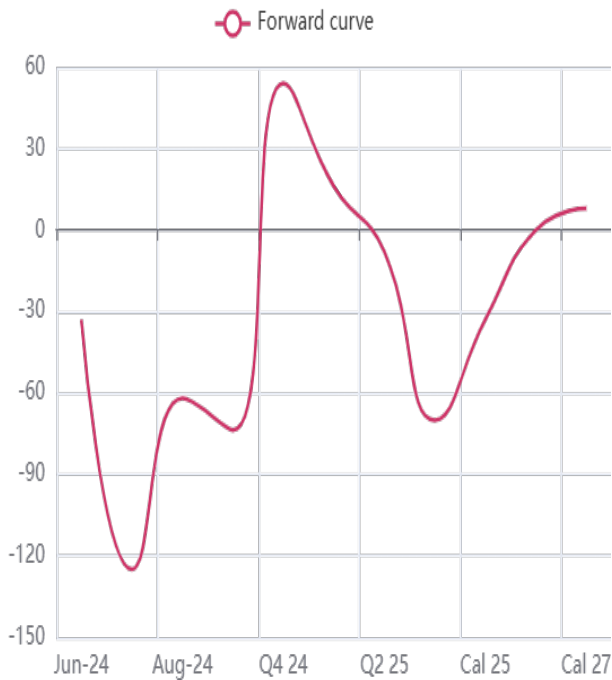
巴拿马型散货船Panamax

4TC	\$/day	WoW	
Jun-24	15,721.00	-108.0	-0.7 %
Jul-24	16,075.00	-54.0	-0.3 %
Aug-24	15,764.00	-90.0	-0.6 %
Q3 24	15,813.00	-87.33	-0.5 %
Q4 24	15,375.00	-89.0	-0.6 %
Q1 25	12,486.00	-39.0	-0.3 %
Q2 25	14,007.00	-36.0	-0.3 %
Q3 25	13,657.00	-50.0	-0.4 %
Cal 25	13,370.50	-38.5	-0.3 %
Cal 26	12,521.00	3.0	0.0 %
Cal 27	12,307.00	0.0	0.0 %



超大灵便型散货船Supramax

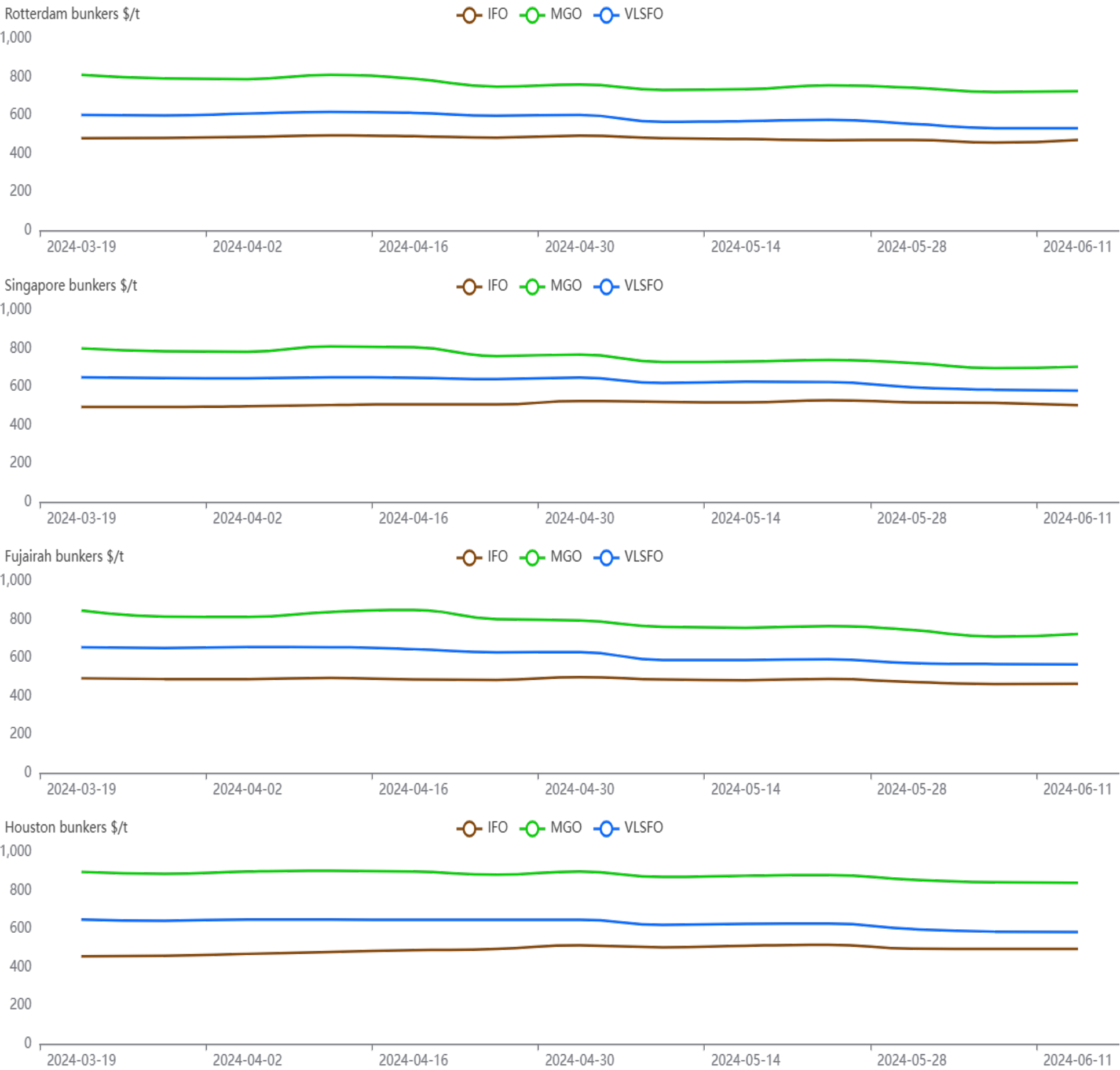
10TC	\$/day	WoW	
Jun-24	14,717.00	-33.0	-0.2 %
Jul-24	15,396.00	-125.0	-0.8 %
Aug-24	15,392.00	-62.0	-0.4 %
Q3 24	15,407.00	-73.67	-0.5 %
Q4 24	14,971.00	54.0	0.4 %
Q1 25	11,958.00	16.0	0.1 %
Q2 25	13,467.00	-8.0	-0.1 %
Q3 25	13,188.00	-70.0	-0.5 %
12,950.25	Cal 25	-33.0	-0.3 %
Cal 26	12,333.00	0.0	0.0 %
Cal 27	12,183.00	8.0	0.1 %



第六部分 燃油价格 BUNKER PRICE

MP	LO	HO	MO	SP	WoW	W%	M%
zhoushan	591.0	539.0	758.0	52.0	6.5	14.29	-50.48
Singapore	581.0	505.5	706.0	75.5	7.0	10.22	-29.77
Rotterdam	533.5	471.5	726.5	62.0	-13.5	-17.88	-33.69
Fujairah	567.0	465.0	725.5	102.0	-2.0	-1.92	-3.32
Houston	583.5	496.5	841.0	87.0	-2.5	-2.79	-24.02

(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	-1.35	0.0	-8.64
Maize	210.0		0.0	0.0	-0.94	-17.11
Soybeans	229.0		-3.0	-1.29	-0.87	-8.71
Rice	257.0		-1.0	-0.39	2.8	26.51
Barley	226.0		-2.0	-0.88	0.44	-2.62
Energy	Index		+/-	Weekly	Monthly	YTD
Crude Oil	USD/Bbl	75.46	-1.72	-2.23	-3.85	6.82
Brent	USD/Bbl	79.62	-1.69	-2.08	-4.12	5.54
Natural Gas	USD/MMBtu	2.98	0.4	15.5	30.13	32.44
Gasoline	USD/Gal	2.38	-0.04	-1.65	-5.56	-5.18
Heating Oil	USD/Gal	2.36	-0.03	-1.26	-3.28	0.85
Ethanol	USD/Gal	1.81	-0.01	-0.55	0.0	-25.82
Naphtha	USD/T	629.64	-32.46	-4.9	-3.91	5.88
Propane	USD/Gal	0.7	0.0	0.0	1.45	16.67
Uranium	USD/Lbs	87.4	-1.2	-1.35	-5.26	60.07
Methanol	CNY/T	2559.0	-76.0	-2.88	-2.37	22.91
TTF Gas	EUR/MWh	32.75	-1.89	-5.46	11.47	21.88
UK Gas	GBp/thm	77.35	-5.6	-6.75	8.49	20.63
Industrial	Index		+/-	Weekly	Monthly	YTD
Copper	USD/Lbs	4.49	-0.11	-2.39	-4.47	20.05
Coal	USD/T	133.0	-10.9	-7.57	-7.64	-3.48
Steel	CNY/T	3448.0	-71.0	-2.02	-0.92	-6.15
Iron Ore	USD/T	108.48	-9.04	-7.69	-7.23	-0.02
Aluminum	USD/T	2575.5	-77.0	-2.9	1.4	16.22
Lithium	CNY/T	101500.0	-4000.0	-3.79	-7.31	N/A
Metals	Index		+/-	Weekly	Monthly	YTD
Gold	USD/t.oz	2294.4	-32.6	-1.4	-2.33	16.93
Silver	USD/t.oz	29.7	-0.7	-2.3	5.69	26.06
Platium	USD/t.oz	974.8	-69.5	-6.66	-3.36	-5.29
Currencies	Index		+/-	Weekly	Monthly	YTD
EUR/USD	1.08		0.0	0.0	0.0	0.93
USD/CNY	7.27		0.01	0.14	0.41	1.96

第八部分 本周话题 WEEKLY TOPIC



欧盟燃料法规-FuelEU Maritime

欧盟的航运碳减排措施远超IMO的航运碳减排安排。2023年7月23日，欧盟FuelEU Maritime 法规正式出台，简称燃料法规，该法规共32条外加5个附件，对航运碳减排计划进行了全面的安排。管辖的船舶范围为任何船旗国5000总吨以上的船舶，其航程抵达、停靠或驶离成员国港口或在成员国港口间航行的船舶。2025年1月1日起开始适用，标准化排放监测计划从2024年8月31日开始。

该法规，首先在船舶燃料的使用上要求进入欧盟的大多数船舶使用低碳或者零碳燃料，停靠港口时应当使用岸电；其次，在船舶温室气体监测方面，欧盟将建立独立的报告、监测与验证系统监测船舶执行本法案；最后，在惩罚上，对不合规的船舶航运企业进行惩罚。除此之外，该法案还产生了其他边际效应，该法案可能会引导船舶对燃料储存和接岸电装置进行规模化改造，因为设备的新增对船员也提出了新的操作规范要求和熟悉操作要求。

燃料法规的出台创新性地从船舶使用的燃料入手，以强制的方式要求船舶使用低碳燃料或可再生燃料，并引导船舶进行岸电改造，确保到2050年时航运业完成从化石燃料到可持续燃料的转变。这种措施将刺激低碳和零碳的燃料的开发和使用，促进船舶进行技术创新，督促现有船舶更换设备和引入低碳和零碳燃料，从根本上减少航运碳排放。

IMO目前采用的是仅计算燃料使用过程的碳排放计算方式，而燃料法规规定采用燃料的全生命周期的计算方式，即计算从燃料生产到燃料燃烧全过程的所有碳排放。对于新型燃料而言，这两种计算方式将产生较大不同，比如在全生命周期计算方式之下，电解甲醇比工业甲醇的碳足迹更低，是更为清洁的选择。全生命周期是一种更加严格的碳排放计算方式，将迫使燃料制备过程也进行技术创新，全链条式地进行减排。

燃料法规是先制定目标、后关注技术，要求船舶航行和停泊中所排放的温室气体最大限度减少碳排放，没有对低碳燃料和零碳燃料的种类和比例作明确限制，也并不规定船体的设备技术改进要求、燃料的选择要求、燃料供应商的选择标准等，具体的技术更新措施交由市场主体决定。这种规范方式表面上将放松技术要求和燃料要求，为船舶改造和燃料选择提供较大的灵活性。

燃料法规要求船舶对燃料消耗和二氧化碳排放情况进行检测和报告，这可能会导致再次引入了一个单独的报告和验证系统，加重了船方的报告义务，呼吁可以考虑纳入合并到MRV/DCS的报告系统。

燃料法规一方面为欧盟燃料市场和航运市场带来贸易保护，另一方面将加重船方义务和提高船东成本，使部分老旧船难以应对贸易成本上升的难题；这导致贸易壁垒，最终将影响欧盟的燃料市场和进出口市场。

The EU's carbon reduction measures for shipping far exceed the IMO's shipping carbon reduction arrangements. On 23rd July 2023, the FuelEU Maritime Regulation, also known as the FuelEU, was officially introduced, consisting of 32 articles and 5 annexes, providing a comprehensive arrangement for shipping carbon reduction plans. The regulation covers ships of over 5000 gross tons from any flag state, arriving, stopping, or departing from ports of member countries or sailing between member country ports. It will come into effect on 1st January 2025, with standard emission monitoring plans beginning on 31st August 2024.

The FuelEU firstly requires most ships entering the EU to use low-carbon or zero-carbon fuels and to use shore power when in port. Secondly, concerning greenhouse gas monitoring for ships, the EU will establish an independent reporting, monitoring, and verification system to monitor ships' compliance with this regulation. Finally, in terms of penalties, penalties will be imposed on non-compliant shipping companies. Additionally, the regulation may lead to ships scaling up fuel storage and shore power installations due to the introduction of new operational and familiarity requirements for crews.

The innovative aspect of the FuelEU lies in starting with the fuels ships use, mandating the use of low-carbon or renewable fuels and guiding ships to undergo shore power upgrades to ensure the shipping industry transitions from fossil fuels to sustainable fuels by 2050. This measure will drive the development and use of low-carbon and zero-carbon fuels, promote technological innovation in shipping, urge existing ships to upgrade equipment and introduce low-carbon and zero-carbon fuels to fundamentally reduce carbon emissions from shipping.

The IMO currently only calculates carbon emissions from the fuel usage process, while the FuelEU stipulates using the full life cycle of the fuel for calculation, including all carbon emissions from fuel production to combustion. For new fuels, these two calculation methods will yield significant differences; for instance, under the full life cycle calculation, electrolytic methanol has a lower carbon footprint than industrial methanol, making it a cleaner choice. The full life cycle is a more stringent carbon emissions calculation method that will compel innovation in fuel preparation processes to reduce emissions across the entire chain.

The FuelEU sets targets first and focuses on technology later, demanding the maximum reduction of carbon emissions from greenhouse gases emitted during ship operations and berthing. It does not explicitly restrict the types and proportions of low-carbon and zero-carbon fuels, nor does it specify requirements for equipment technology improvements, fuel selection, or fuel supplier selection standards, leaving specific technical upgrade measures to be decided by market entities. This regulatory approach appears to relax technical and fuel requirements, providing greater flexibility for ship upgrades and fuel selection.

The FuelEU requires ships to monitor and report fuel consumption and CO2 emissions, potentially leading to the reintroduction of a separate reporting and verification system, increasing reporting obligations for shipowners, suggesting the possibility of incorporating it into the MRV/DCS reporting system.

On one hand, the FuelEU brings trade protection to the EU's fuel and shipping markets; on the other hand, it increases obligations for shipowners and raises costs for ship operators, making it challenging for some old ships to cope with rising trading costs. This results in trade barriers that will ultimately impact the EU's fuel market and import-export market.

