



2024年 第25周市场周报

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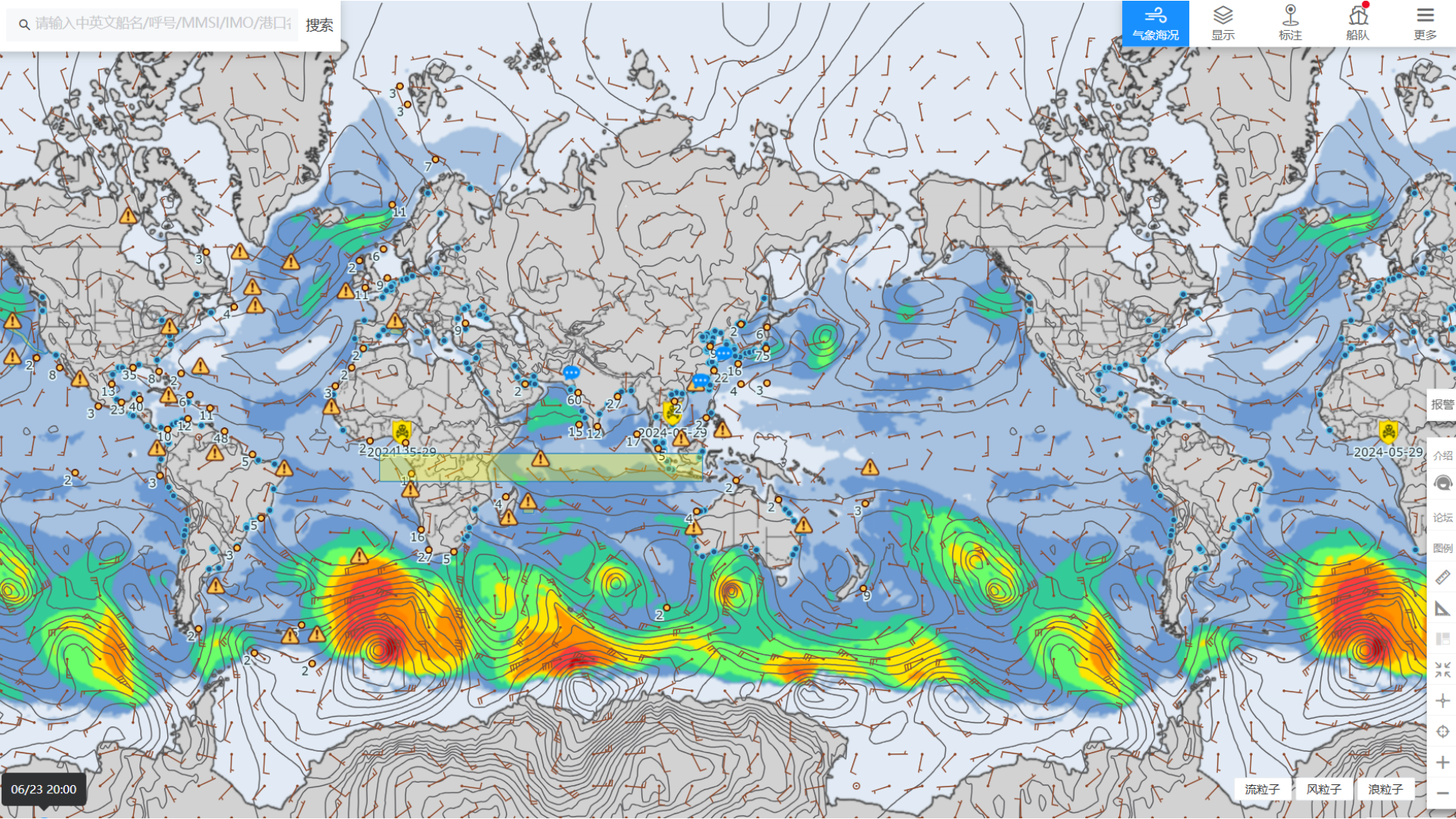
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本周话题 WEEKLY TOPIC

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830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 830 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4-5级，相关海域1米轻浪到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。西北太平洋有个低压在发展，那里海况风浪大。The coming week the wind in Bohai Sea, Yellow Sea and China East Sea might stay breeze with seas from slight to moderate. 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 one low low-pressure developing in the East North of the Pacific Ocean and the seas there are rough.

海盗事件 Piracy

6月15日晚上8点，新加坡海峡。一艘正在航行的化学品船看到一艘灯光昏暗的小船靠近船舶的左舷，并改变了航向。在距离1.5海里的地方，这艘小船突然开始闪烁灯光，加速驶向该轮，并试图靠近。该船采取了规避动作并通知了VTIS。一艘巡逻艇赶到协助。看到巡逻艇后，那艘小船停止了行动并离开。15.06.2024: 1212 UTC: Posn: 01:14.5N - 104:03.5E, Singapore Straits. A chemical tanker underway sighted a dimly lit boat near the port bow and altered course. At a distance of 1.5nm, the boat suddenly started flashing lights, increased speed towards the tanker and made an approach in an attempt to come alongside. The tanker took evasive manoeuvres and notified VTIS. A patrol boat arrived to assist the tanker. Seeing the patrol boat, the boat aborted and moved away.

海上事件 Marine Incidents

6月19日，一艘82000载重吨希腊散货船Tutor轮据信在被胡塞武装无人艇击中近一周后在红海沉没。正在巡逻该地区的西方海军无法追踪到这艘漂浮在红海中的散货船，该区域漂浮的残骸表明这艘船很可能已经沉没。On June 19, a Greek bulk carrier named Tutor with a capacity of 82,000 deadweight tons reportedly sank in the Red Sea after being hit by an unmanned boat belonging to the Houthi armed forces, about a week after the incident. Western naval forces patrolling the area were unable to locate the drifting bulk carrier in the Red Sea. The floating debris in the region indicates that the ship has likely sunk.

其它 Others

没有 Nil

备注 Remark

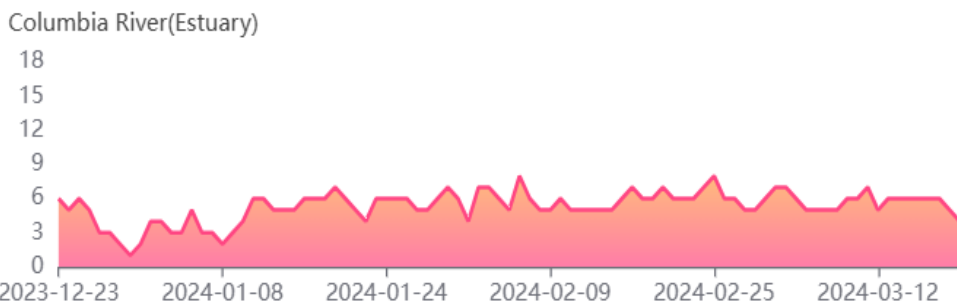
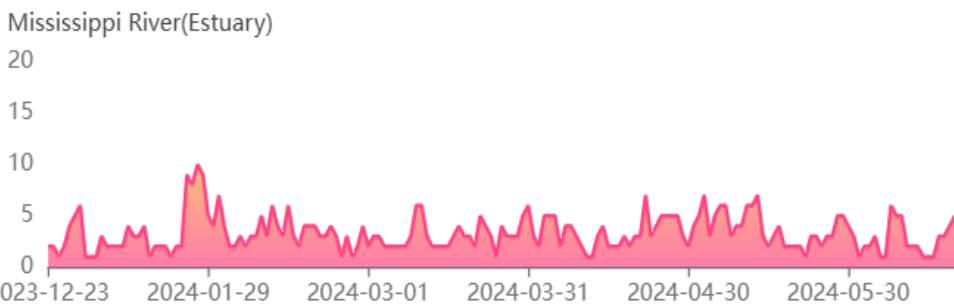
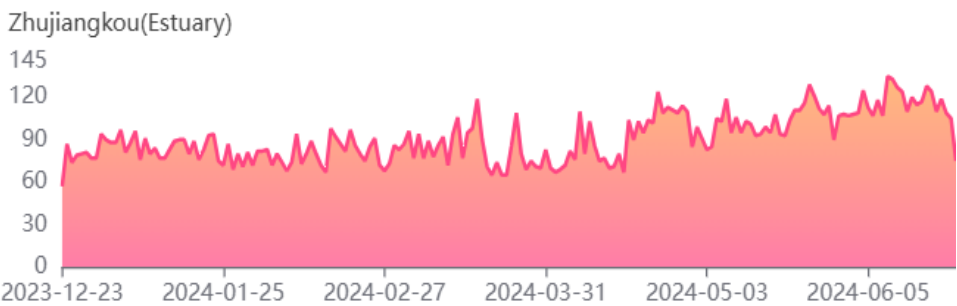
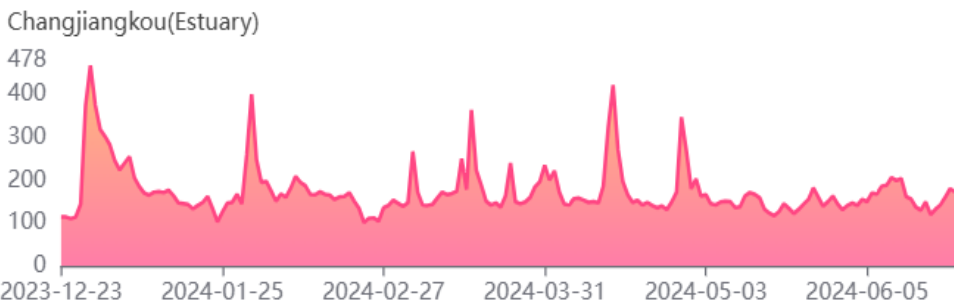
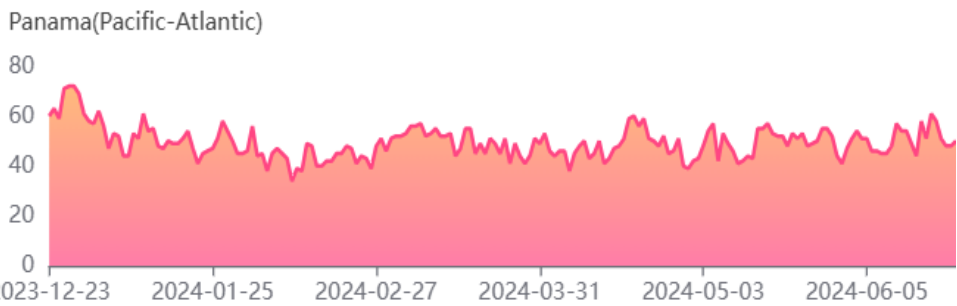
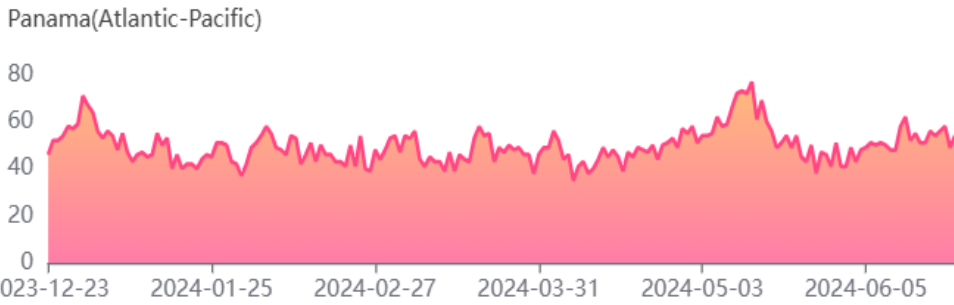
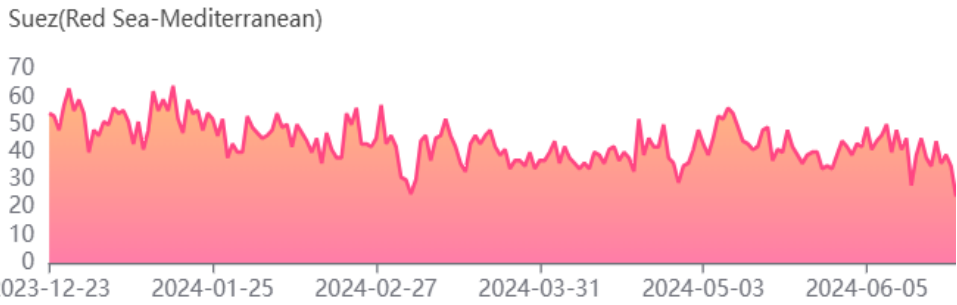
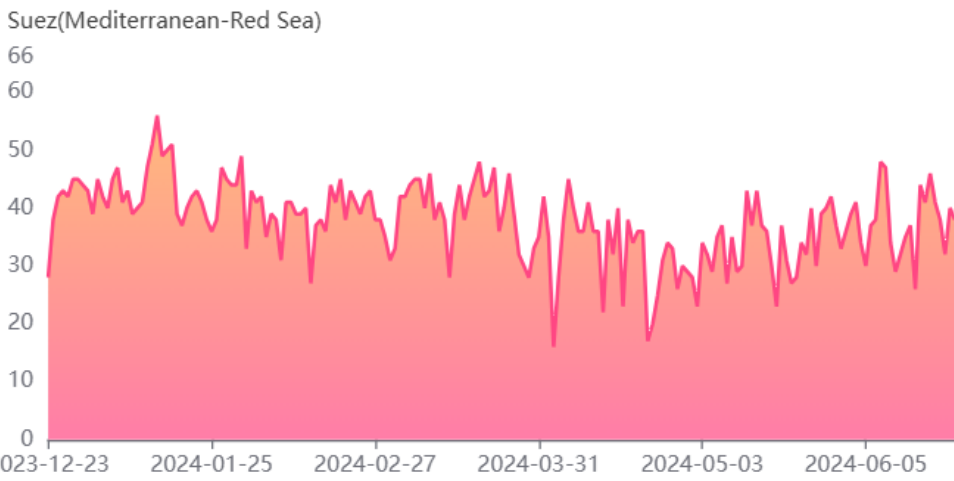
本报告数据截止时间为2024年6月23日北京时间17点；所有数据和或观点仅供参考，在任何情况下本公司及其员工不承担任何风险。The data deadline for this report is Beijing time 17 hours on June 23rd of 2024; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

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	24	1159	-40	-90
Miss.Riv.	5	73	-6	-35
CJK	173	4584	-196	-89
Pa.Atlan.	54	1448	5	-203
Colum.Riv.	7	118	19	-35
Suez.Med.	38	1084	36	152
Pa.Pac.	50	1464	16	54
ZJK	75	3284	-94	310

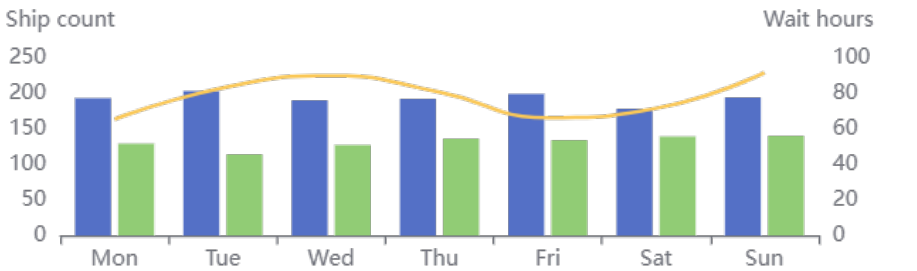
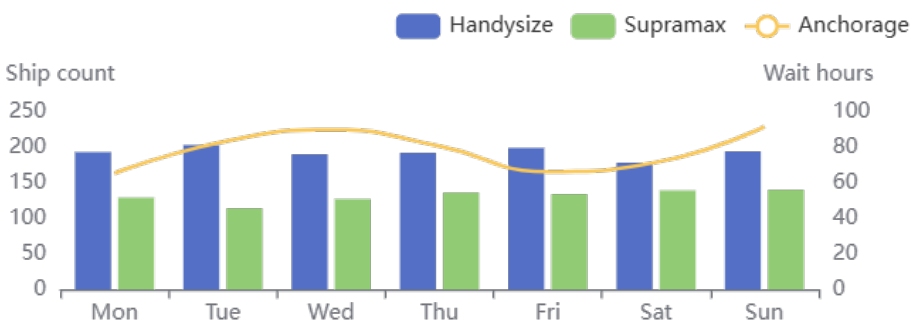


(P.N-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

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

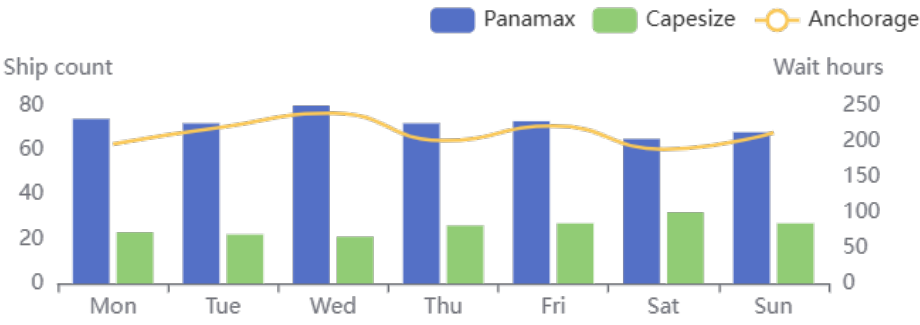
Type	M	T	W	Th	F	Sat	Sun
HDY	193	203	190	192	199	178	194
SMX	129	114	127	136	134	139	140
WT.h.	65.4	83	89.9	80.6	66.2	71.5	91.5



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

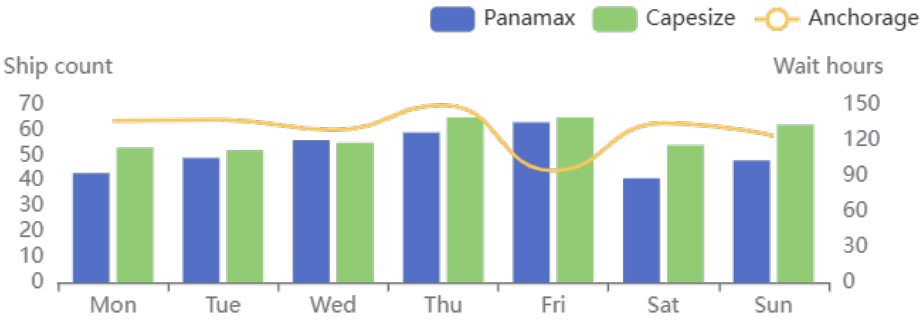
Type	M	T	W	Th	F	Sat	Sun
Pan.	74	72	80	72	73	65	68
Cap	23	22	21	26	27	32	27
WT.h.	196.2	220.2	239.4	200.8	221.7	188.6	212



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

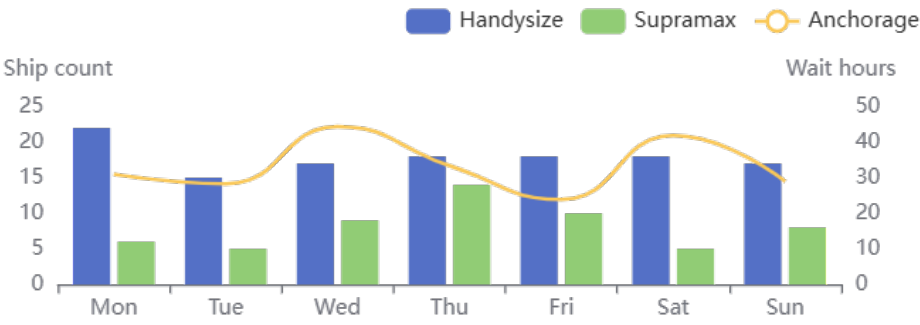
Type	M	T	W	Th	F	Sat	Sun
Pan.	43	49	56	59	63	41	48
Cap	53	52	55	65	65	54	62
WT.h.	136.6	137	128.8	149.6	94.3	134.4	124



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

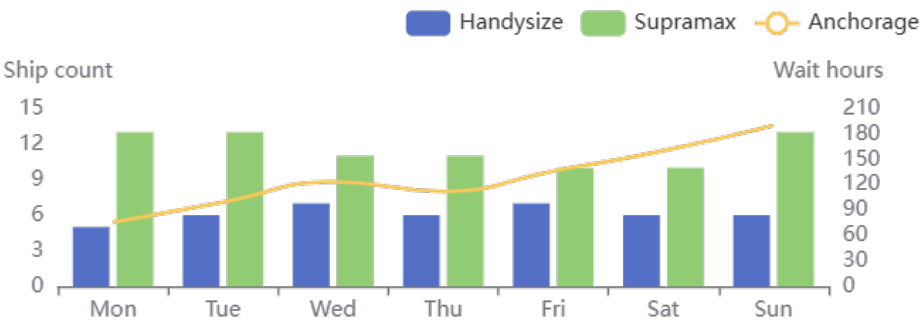
Type	M	T	W	Th	F	Sat	Sun
HDY	22	15	17	18	18	18	17
SMX	6	5	9	14	10	5	8
WT.h.	31	28.3	44.4	33.4	23.9	41.9	29



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

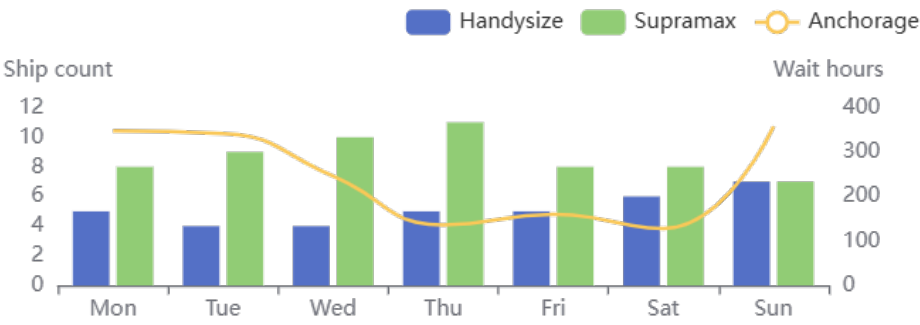
Type	M	T	W	Th	F	Sat	Sun
HDY	5	6	7	6	7	6	6
SMX	13	13	11	11	10	10	13
WT.h.	75.5	99.5	123.5	112.3	136.3	160.3	190



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

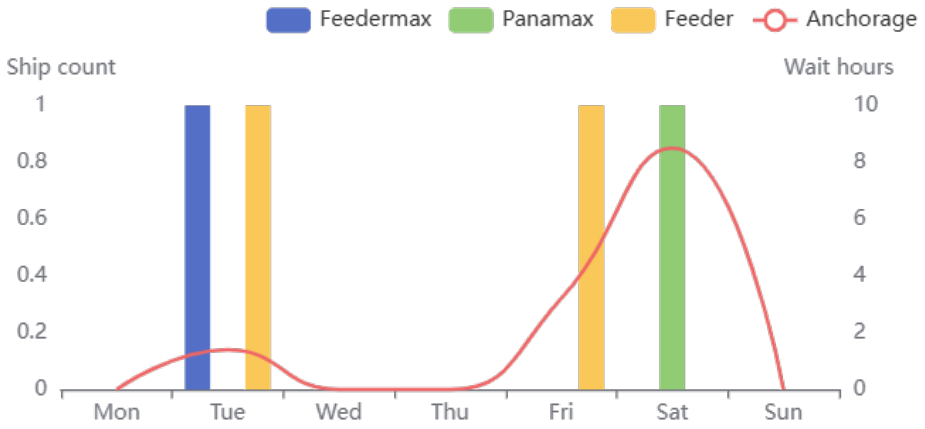
Type	M	T	W	Th	F	Sat	Sun
HDY	5	4	4	5	5	6	7
SMX	8	9	10	11	8	8	7
WT.h.	347.7	341.9	246	135.9	159.9	128.25	357.5



最近一周香港区域集装箱船锚泊数量和平均等待时长

Latest Week Update for Container Vessels Num. and Waiting Time Information on Anchorages of HongKong

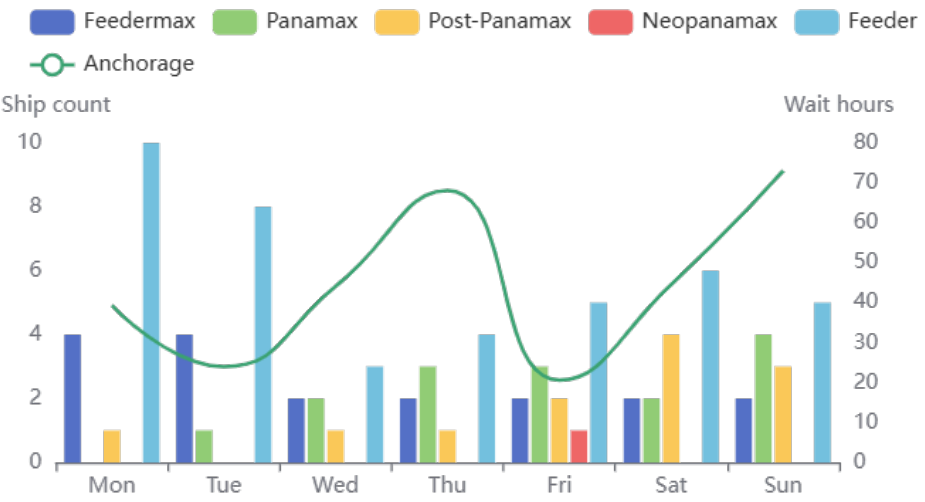
Type	M	T	W	Th	F	Sat	Sun
F.ma.	0	1	0	0	0	0	0
Pan.	0	0	0	0	0	1	0
PPx	0	0	0	0	0	0	0
NPx	0	0	0	0	0	0	0
Fd	0	1	0	0	1	0	0
WT.h.	0.0	1.4	0.0	0.0	3.2	8.5	0.0
Ulcw	0	0	0	0	0	0	0



最近一周上海区域集装箱船锚泊数量和平均等待时长

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

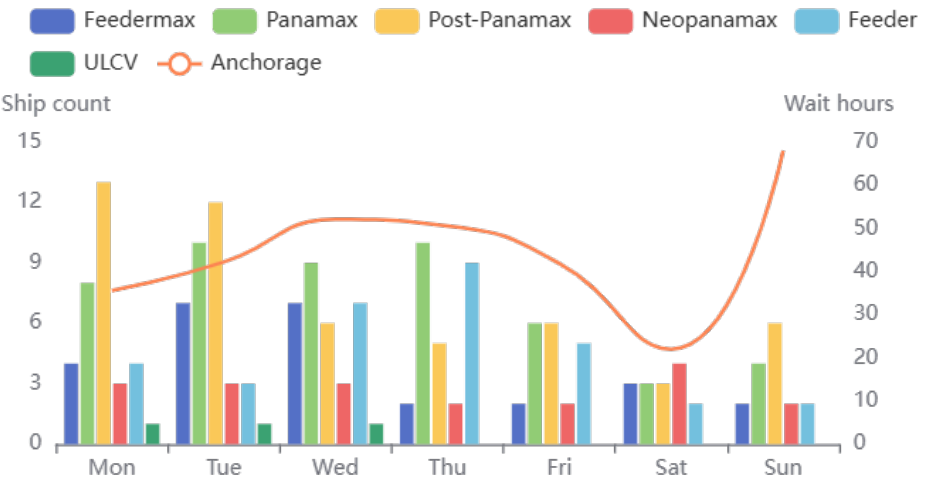
Type	M	T	W	Th	F	Sat	Sun
F.ma.	4	4	2	2	2	2	2
Pan.	0	1	2	3	3	2	4
PPx	1	0	1	1	2	4	3
NPx	0	0	0	0	1	0	0
Fd	10	8	3	4	5	6	5
Ulcw	0	0	0	0	0	0	0
WT.h.	39.3	24	44.1	68.1	20.6	44.6	73



最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

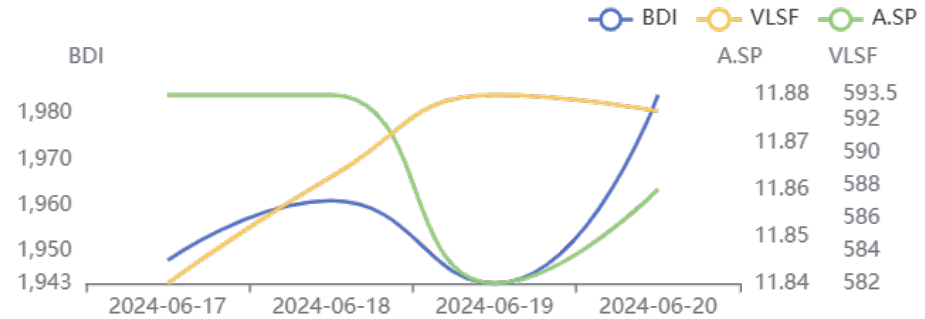
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

Type	M	T	W	Th	F	Sat	Sun
F.ma.	4	7	7	2	2	3	2
Pan.	8	10	9	10	6	3	4
PPx	13	12	6	5	6	3	6
NPx	3	3	3	2	2	4	2
Fd	4	3	7	9	5	2	2
Ulcw	1	1	1	0	0	0	0
WT.h.	35.6	42.2	52.1	50.6	41.9	22	68



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

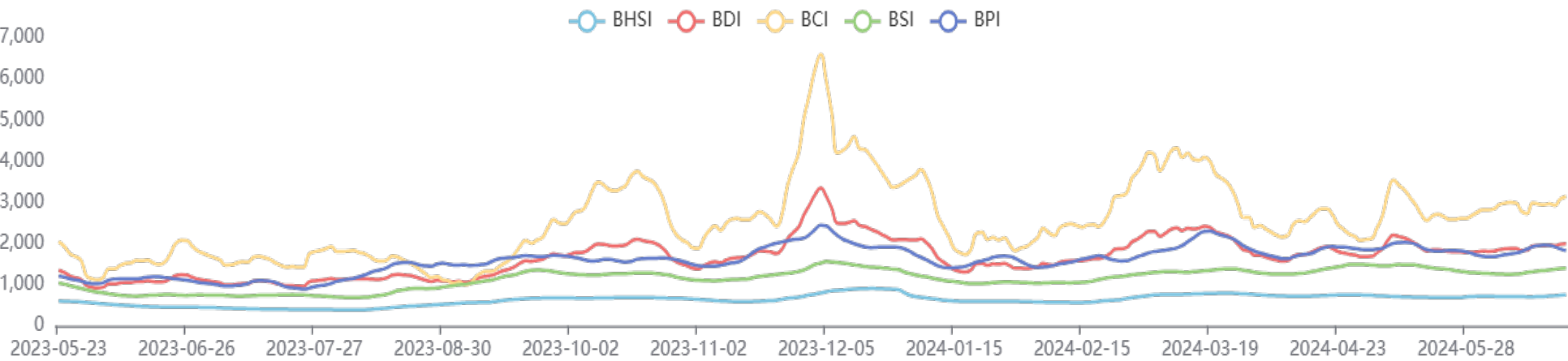
Type	M	T	W	Th	F	Sat	Sun
BDI	1960	1954	1919	1867	1827		
VLSF	582.00	588.50	593.50	592.50			
A.SP	11.88	11.88	11.84	11.86	11.81	11.75	



第三部分 航运市场 SHIPPING MARKET

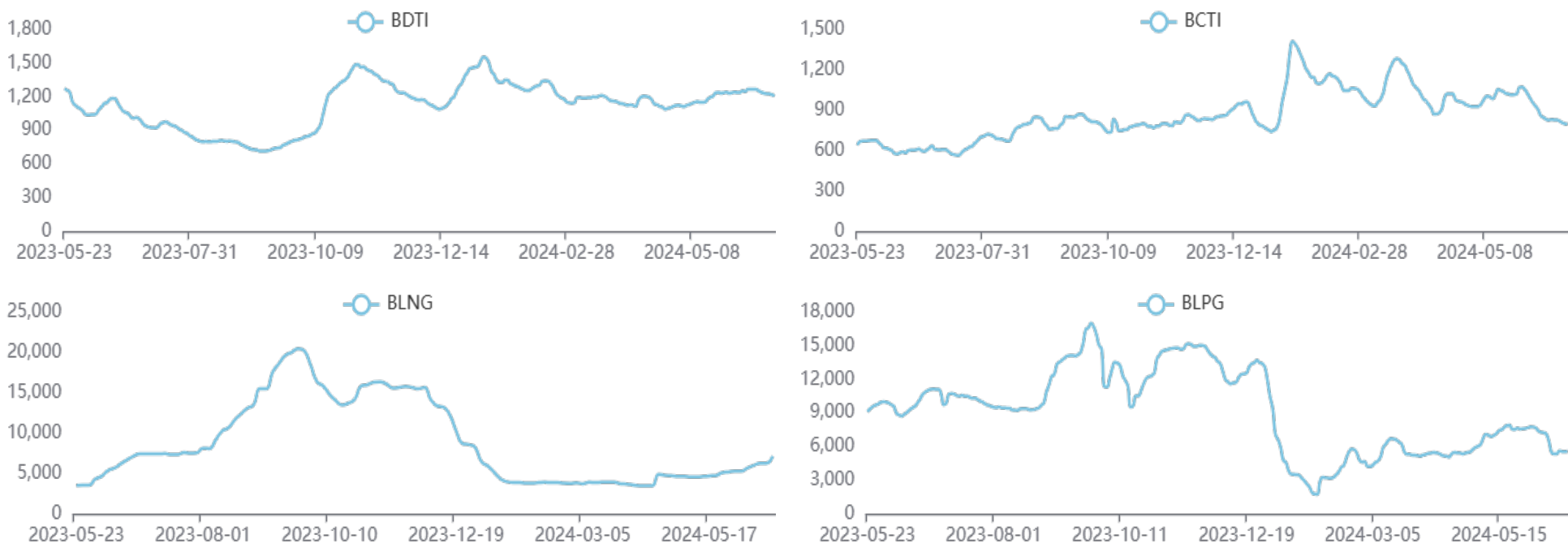
波罗的海干散货指数Baltic Dry Index

Type	PI	WoW	W%	M%	y%
BDI	1997	49.0	2.52	11.13	75.48
BCI	3142	185.0	6.26	20.24	81.62
BPI	1827	-123.0	-6.31	0.16	57.91
BSI	1398	63.0	4.72	5.43	83.71
BHSI	753	42.0	5.91	9.45	65.49

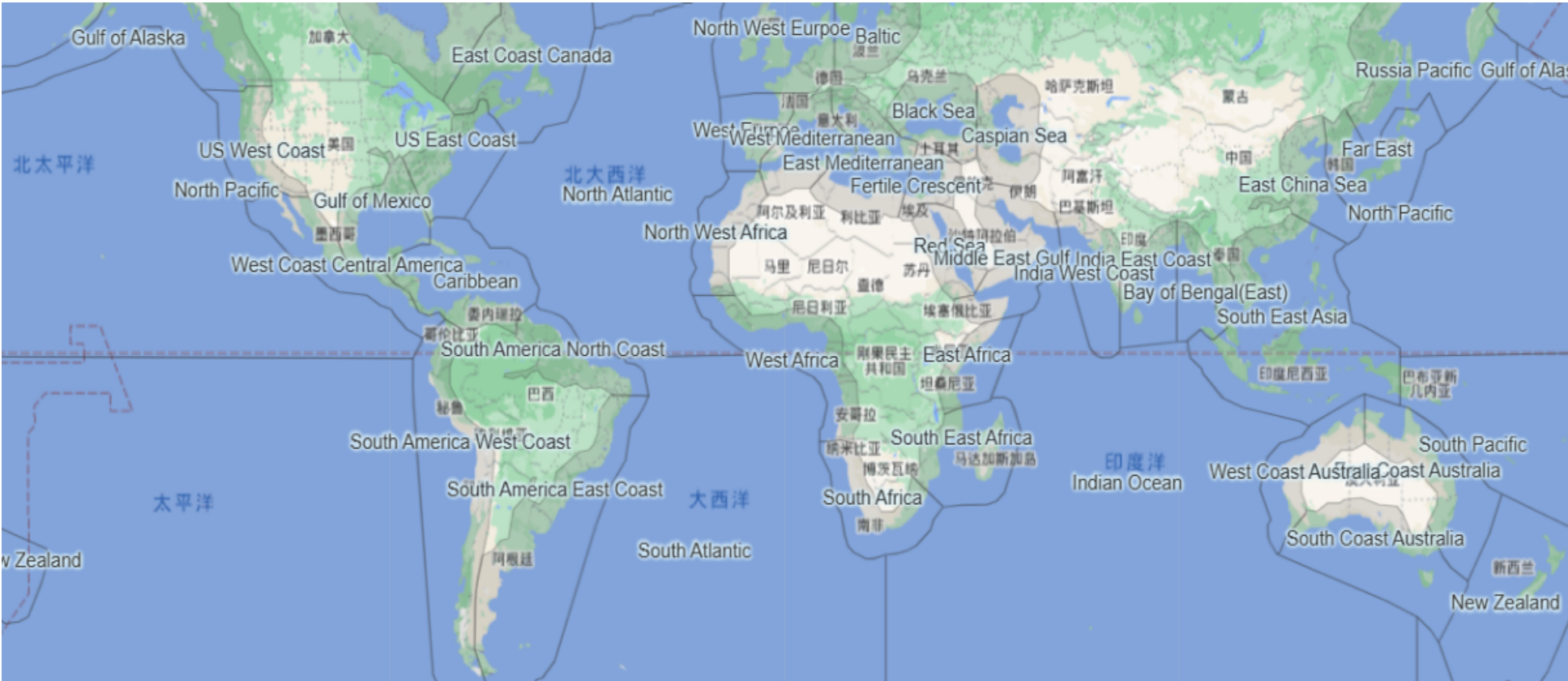


能源运价指数Energy Shipping Index

Type	PI	WoW	W%	M%	y%
BDTI	1205	-35.0	-2.82	-2.35	5.61
BCTI	795	-33.0	-3.99	-22.06	31.84
BLNG	7124	867.0	13.86	40.13	0.17
BLPG	5578	245.0	4.59	-27.06	-45.46



第四部分 运力分布 SUPPLY DISTRIBUTION

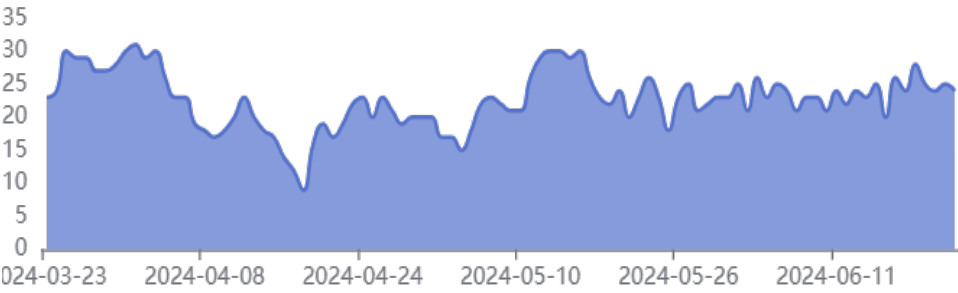


好望角型散货船 Capesize

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	24	28	25	24	25	24



区域：南非，最近一周好望角型散货船准备装货船舶数量

Area: South Africa, The latest week update number for Capesize with cargo loading intention.

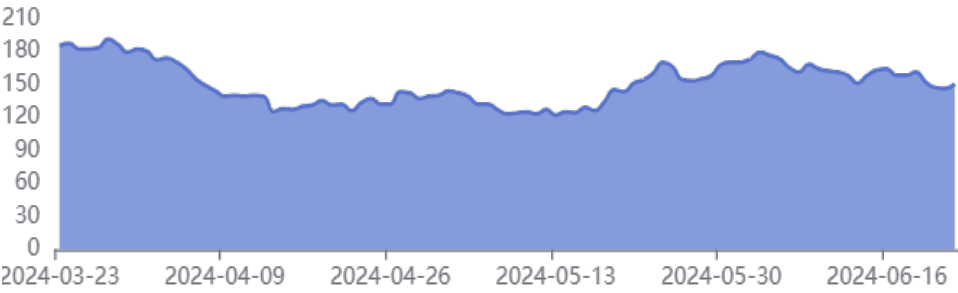
Type	M	T	W	Th	F	Sat	Sun
Cape	24	22	28	30	32	30	28

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.

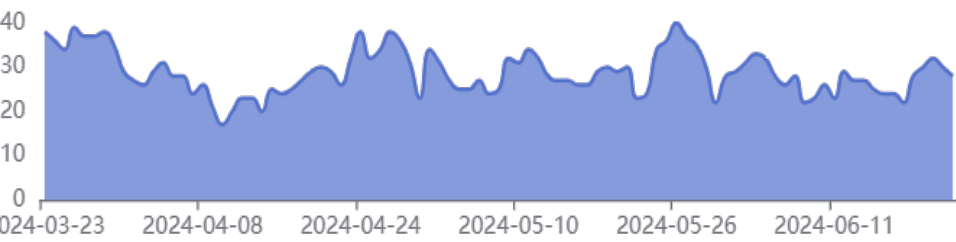
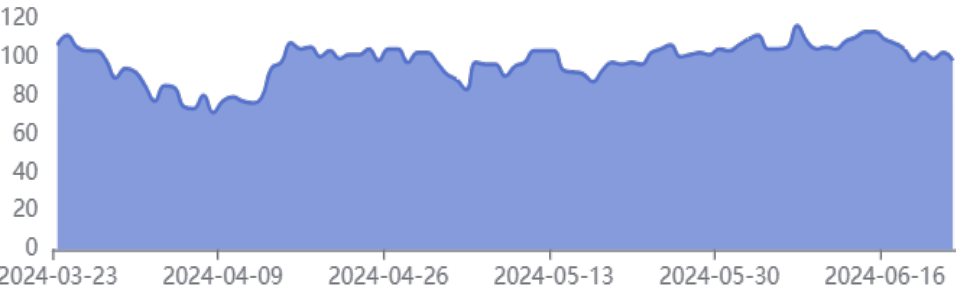
Type	M	T	W	Th	F	Sat	Sun
Pan.	158	158	161	152	147	146	150



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.

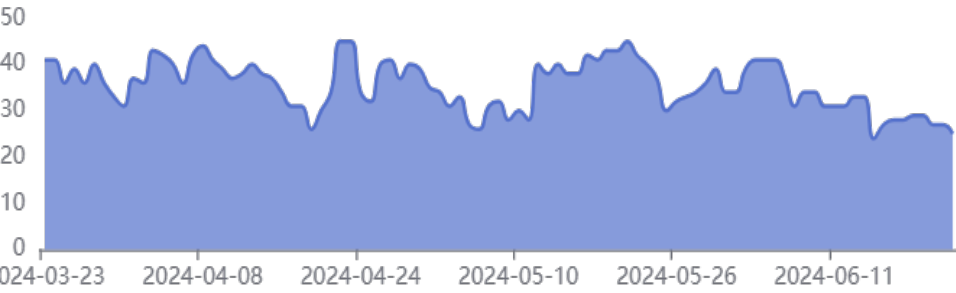
Type	M	T	W	Th	F	Sat	Sun
Cape	107	104	98	102	99	102	98



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.

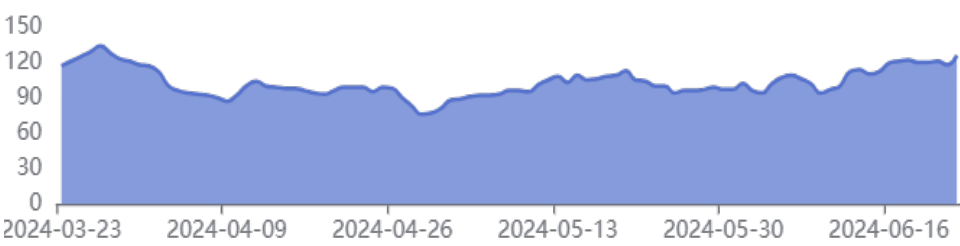
Type	M	T	W	Th	F	Sat	Sun
Pan.	23	20	17	17	22	22	26



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.	121	122	120	120	121	118	126

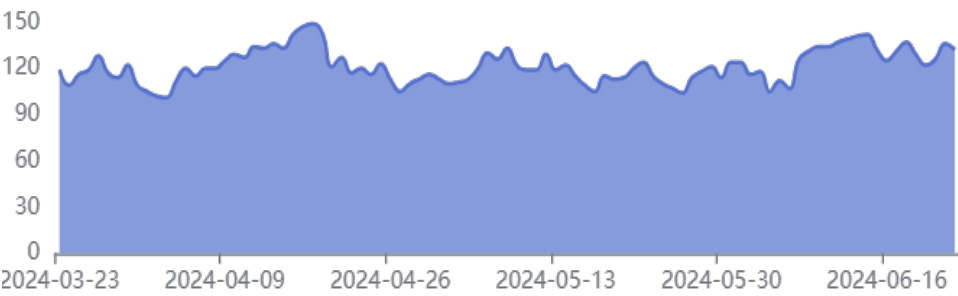


超大灵便型散货 SUPRAMAX

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.

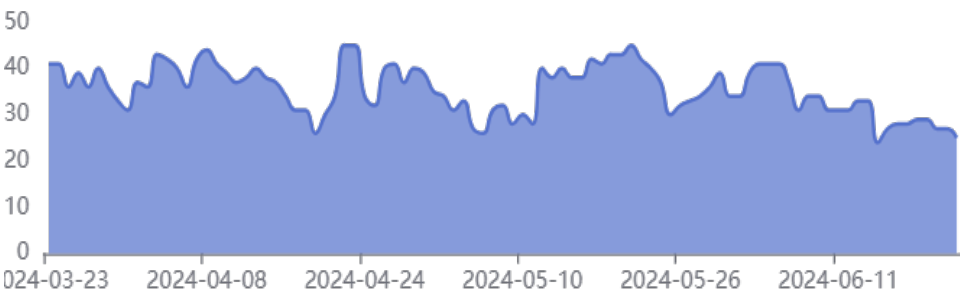
Type	M	T	W	Th	F	Sat	Sun
SMX	131	137	129	122	126	136	132



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.

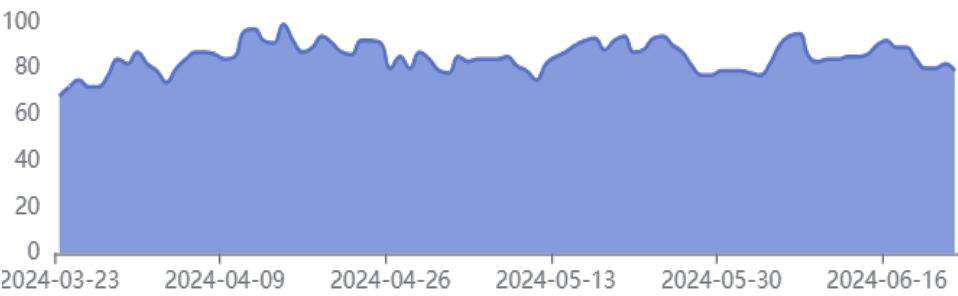
Type	M	T	W	Th	F	Sat	Sun
SMX	28	28	29	29	27	27	25



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.

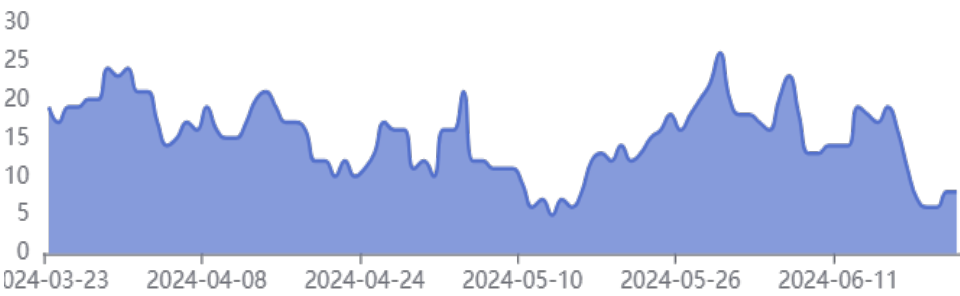
Type	M	T	W	Th	F	Sat	Sun
SMX	16	11	7	6	6	8	8



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.

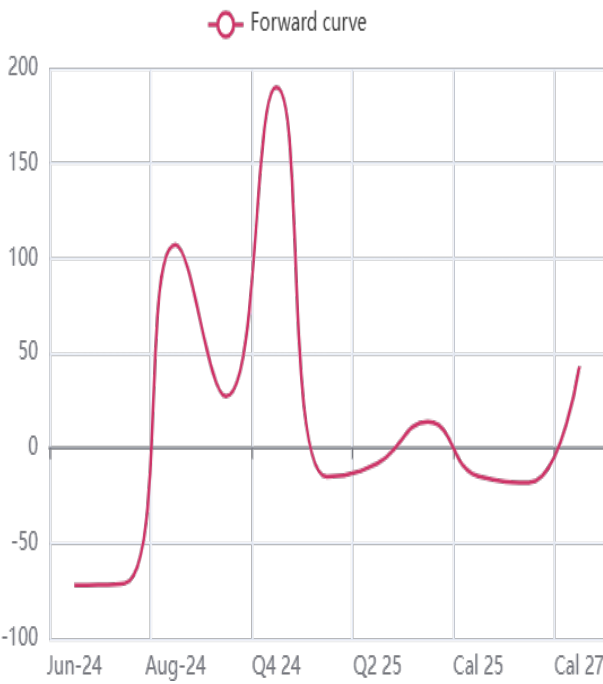
Type	M	T	W	Th	F	Sat	Sun
SMX	89	89	84	80	80	82	79



第五部分 远期运价协议 FFA

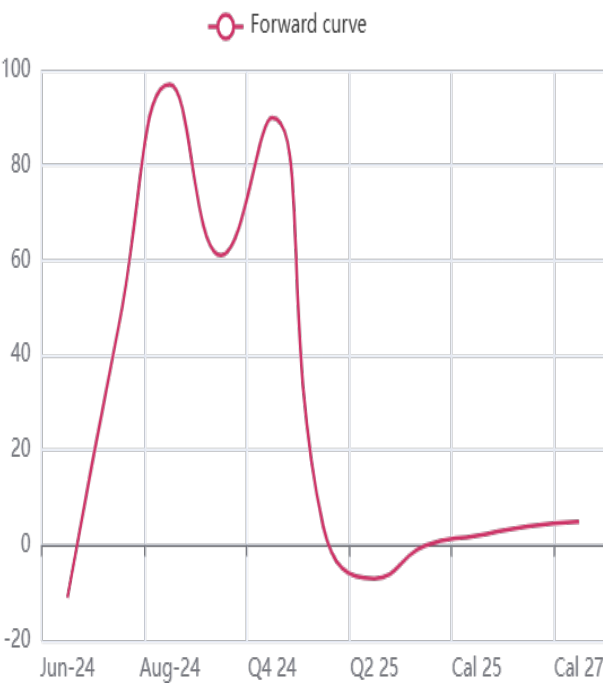
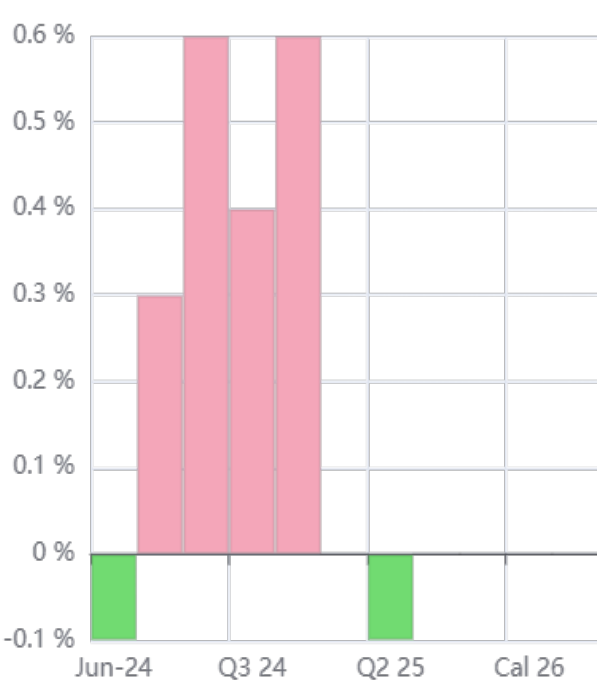
好望角型散货船Capesize

5TC	\$/day	WoW	
Jun-24	25,364.00	-72.0	-0.3 %
Jul-24	26,350.00	-71.0	-0.3 %
Aug-24	24,821.00	107.0	0.4 %
Q3 24	25,351.00	27.33	0.1 %
Q4 24	26,911.00	190.0	0.7 %
Q1 25	15,396.00	-15.0	-0.1 %
Q2 25	20,571.00	-8.0	0.0 %
Q3 25	23,864.00	14.0	0.1 %
Cal 25	20,945.25	-14.75	-0.1 %
Cal 26	20,271.00	-18.0	-0.1 %
Cal 27	19,568.00	43.0	0.2 %



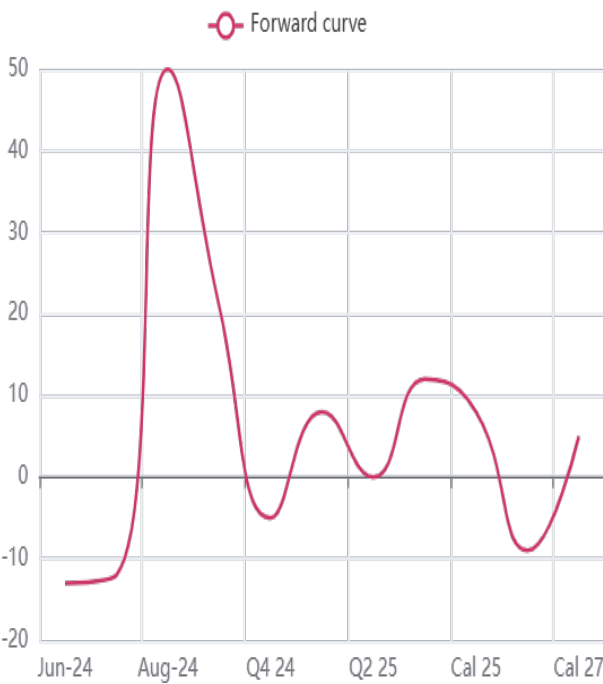
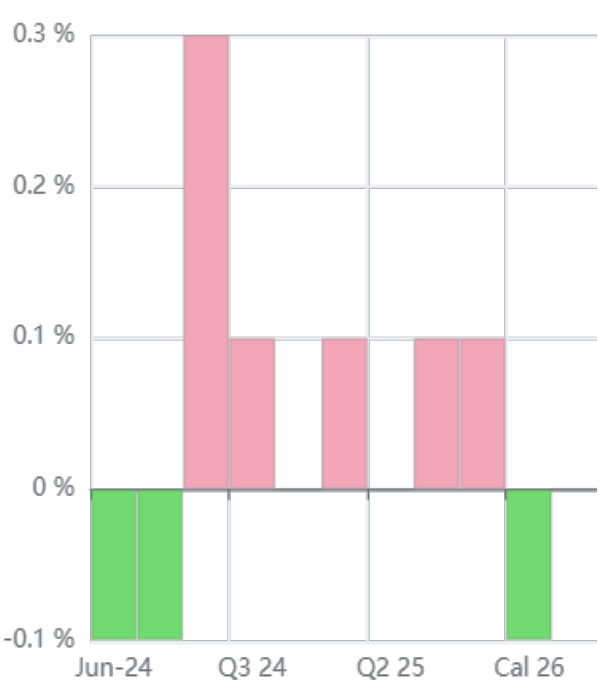
巴拿马型散货船Panamax

4TC	\$/day	WoW	
Jun-24	15,150.00	-11.0	-0.1 %
Jul-24	15,182.00	46.0	0.3 %
Aug-24	15,311.00	97.0	0.6 %
Q3 24	15,284.67	61.0	0.4 %
Q4 24	15,436.00	90.0	0.6 %
Q1 25	12,418.00	4.0	0.0 %
Q2 25	13,943.00	-7.0	-0.1 %
Q3 25	13,593.00	0.0	0.0 %
Cal 25	13,311.75	2.0	0.0 %
Cal 26	12,511.00	4.0	0.0 %
Cal 27	12,298.00	5.0	0.0 %



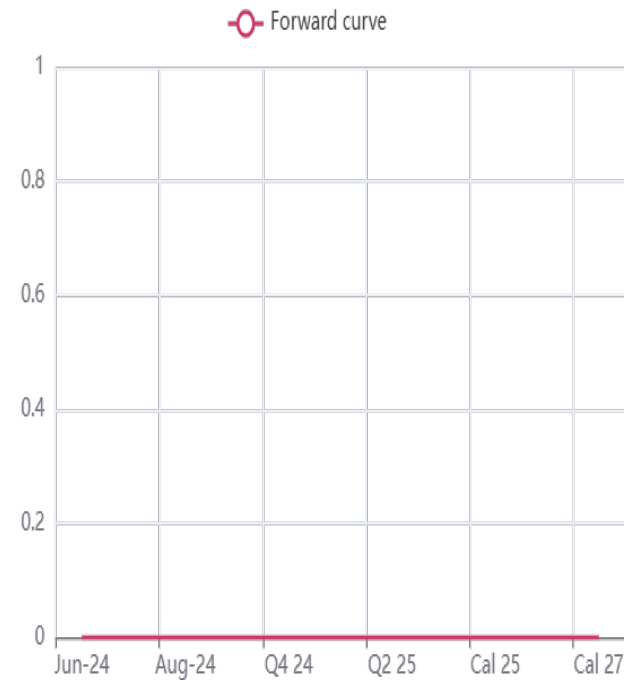
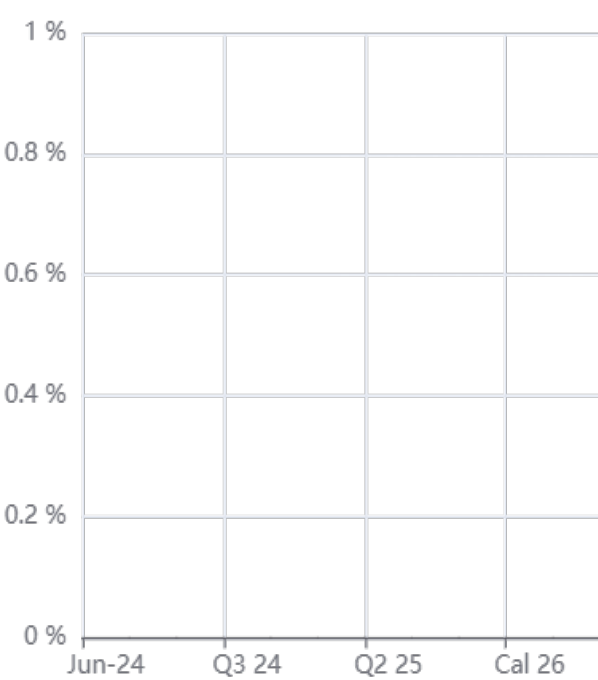
超大灵便型散货船Supramax

10TC	\$/day	WoW	
Jun-24	14,750.00	-13.0	-0.1 %
Jul-24	15,271.00	-12.0	-0.1 %
Aug-24	15,300.00	50.0	0.3 %
Q3 24	15,304.33	21.0	0.1 %
Q4 24	15,083.00	-5.0	0.0 %
Q1 25	11,883.00	8.0	0.1 %
Q2 25	13,425.00	0.0	0.0 %
Q3 25	13,196.00	12.0	0.1 %
12,925.00	Cal 25	8.0	0.1 %
Cal 26	12,358.00	-9.0	-0.1 %
Cal 27	12,188.00	5.0	0.0 %



灵便型散货船Handysize

7TC	\$/day	WoW	
Jun-24	13,213.00	0.0	0.0 %
Jul-24	13,838.00	0.0	0.0 %
Aug-24	13,850.00	0.0	0.0 %
Q3 24	13,833.67	0.0	0.0 %
Q4 24	13,913.00	0.0	0.0 %
Q1 25	10,800.00	0.0	0.0 %
Q2 25	12,375.00	0.0	0.0
Q3 25	12,063.00	0.0	0.0 %
Cal 25	11,825.25	0.0	0.0 %
Cal 26	11,625.00	0.0	0.0 %
Cal 27	11,500.00	0.0	0.0 %



第六部分 燃油价格 BUNKER PRICE

MP	LO	HO	MO	SP	WoW	W%	M%
zhoushan	603.5	534.0	770.0	69.5	17.5	33.65	-39.3
Singapore	599.5	517.5	732.5	82.0	6.5	8.61	-13.68
Rotterdam	548.0	487.0	751.0	61.0	-1.0	-1.61	-42.45
Fujairah	578.0	476.0	750.5	102.0	0.0	0.0	-0.97
Houston	601.5	507.0	850.0	94.5	7.5	8.62	-14.48

(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	213.0		-7.0	-3.18	-3.62	-10.1
Maize	210.0		0.0	0.0	1.94	-15.35
Soybeans	228.0		-1.0	-0.44	-2.98	-12.53
Rice	257.0		0.0	0.0	0.39	26.65
Barley	218.0		-8.0	-3.54	-4.39	-5.22
Energy	Index		+/-	Weekly	Monthly	YTD
Crude Oil	USD/Bbl	79.17	3.71	4.92	-0.99	16.31
Brent	USD/Bbl	83.28	3.66	4.6	-0.9	14.29
Natural Gas	USD/MMBtu	2.8	-0.18	-6.04	6.06	25.56
Gasoline	USD/Gal	2.42	0.04	1.68	-5.84	-3.97
Heating Oil	USD/Gal	2.49	0.13	5.51	0.4	7.33
Ethanol	USD/Gal	1.92	0.11	6.08	7.87	-20.99
Naphtha	USD/T	648.53	18.89	3.0	-2.82	13.53
Propane	USD/Gal	0.75	0.05	7.14	7.14	27.12
Uranium	USD/Lbs	86.65	-0.75	-0.86	-4.73	56.13
Methanol	CNY/T	2492.0	-67.0	-2.62	-8.31	24.29
TTF Gas	EUR/MWh	34.57	1.82	5.56	8.85	12.42
UK Gas	GBp/thm	81.64	4.29	5.55	5.51	10.28
Industrial	Index		+/-	Weekly	Monthly	YTD
Copper	USD/Lbs	4.42	-0.07	-1.56	-13.16	17.87
Coal	USD/T	135.15	2.15	1.62	-4.92	-0.41
Steel	CNY/T	3409.0	-39.0	-1.13	-4.11	-7.64
Iron Ore	USD/T	107.33	-1.15	-1.06	-8.28	-7.07
Aluminum	USD/T	2495.5	-80.0	-3.11	-5.06	11.83
Lithium	CNY/T	97500.0	-4000.0	-3.94	-7.58	N/A
Metals	Index		+/-	Weekly	Monthly	YTD
Gold	USD/t.oz	2320.8	26.4	1.15	-4.84	18.35
Silver	USD/t.oz	29.4	-0.3	-1.01	-7.84	22.4
Platium	USD/t.oz	966.8	-8.0	-0.82	-11.59	-2.37
Currencies	Index		+/-	Weekly	Monthly	YTD
EUR/USD	1.07		-0.01	-0.93	-1.83	-0.93
USD/CNY	7.27		0.0	0.0	0.41	1.68

第八部分 本周话题 WEEKLY TOPIC



2024年巴拿马运河船舶通行情况

2024年6月开始，由于雨季的到来和GATUN湖水位的升高，巴拿马运河管理当局再次宣布将于7月中下旬提升巴拿马运河船舶通航数量。还记得2023年下半年巴拿马运河经历了持续干旱和船舶大排长队的情况，巴拿马运河管理当局两次采取船舶限行措施，影响了船舶的通行效率，一年过去了，巴拿马运河船舶当前的通行情况一直都是航运界关注的重要节点。2020年因为疫情原因，船舶通行量勉强超过11000艘水平；2021年接近12000艘通行水平；2022年的船舶通行量有个高峰12720艘；2023年因为干旱原因导致船舶通行量减少到10910艘水平，2024年第一季度船舶通行量同比下降了35%，预计2024年上半年船舶的通行量接近4000艘水平，属于近四年来最低水平。

2024年以来总通行量下降了，但巴拿马运河每月船舶通行量呈现逐步增加趋势。5月份巴拿马运河两端船舶合计通行量为702艘，日均23艘，环比4月上涨3.4%。从通行船舶类型看，集装箱船是巴拿马运河主要的通行船舶，月度平均通行量182艘，占比整体船舶通行量的47%。散货船通行量自今年初以来逐步上升，由1月的38艘提升到当前的78艘。运河两端锚泊船数量从2月份开始稳步增加，其中散货船平均锚泊时间显著改善，从1月份的平均217小时减小到当前的43小时。集装箱船因为其班轮精细化管理优势，其锚泊等待时间大部分时间稳定在23小时，偶尔会因为各种原因出现异常锚泊时间。

巴拿马运河船舶通行最显著特点是，新闻的船舶通行超过90%都是集装箱船，旧闸的船舶通行超过

50%是石油化学品船舶。

巴拿马运河新闻的吃水限制于6月15日开始从13.41米（44英尺）增加至14.02米（46英尺），但仍低于原来15.24米（50英尺）的吃水限制。最近巴拿马运河区域降雨有所改善导致巴拿马运河管理当局在过去几个月放宽了过境限制，并宣布将在未来几个月进一步放宽，预计这将使得船只通行量有所改善。6月10日，巴拿马运河管理当局宣布船只通行数量将于7月22日增加至每天34艘，理论上这将使得船只通行量更接近每天约36艘的正常水平，比起今年一月份每天仅22艘的限制明显增加。

巴拿马运河原来的船舶通行限制导致了航运一定程度的混乱和绕航，增加了吨海里，导致了相应航运市场的上升。逐步放宽的船舶通行限制将为船舶运营商提供改善航线机会，从而有望减轻一定量的航线绕航，同时红海的局势可能会有所改变，航运局势还会发生微妙的变化。

In 2024, the Panama Canal has seen changes in ship traffic. Due to the rainy season and rising water levels in Lake Gatun, the Panama Canal authorities announced an increase in the number of ships passing through start from in mid to late July. In the second half of 2023, the Panama Canal faced long queues due to continuous drought, prompting the authorities to limit ship traffic twice, impacting efficiency. Ship traffic in the first quarter of 2024 decreased by 35% compared to the previous year. It is anticipated that ship traffic in the first half of 2024 will be close to 4000 ships, the lowest level in nearly four years.

Despite the overall decrease in total traffic since 2024, monthly ship traffic through the Panama Canal has been gradually increasing. In May, a total of 702 ships passed through the canal, averaging 23 ships per day, a 3.4% increase from April. Container ships are the main type of vessel passing through the canal, accounting for 47% of total traffic. Bulk carrier traffic has steadily increased since the beginning of the year. The number of anchored ships at both ends of the canal has been steadily rising since February, with significant improvements in the waiting time for bulk carriers. The waiting time for container ships remains stable at around 23 hours due to their efficient management, occasionally experiencing abnormal waiting times.

The Panama Canal's significant feature is that over 90% of ships passing through the new locks are container ships, while over 50% of those passing through the old locks are oil and chemical tankers.

Starting from June 15th, the draft limit for ships passing through the new locks has been increased from 13.41 meters to 14.02 meters but remains below the original limit of 15.24 meters. Recent improvements in rainfall in the Panama Canal region have led the authorities to ease transit restrictions in the past few months, with further relaxations planned. The increase in daily ship traffic to 34 ships starting on July 22nd is expected to bring traffic closer to the normal level of around 36 ships per day.

The previous restrictions on ship traffic in the Panama Canal led to some confusion and detours in navigation, increasing nautical miles and affecting the shipping market. The gradual easing of these restrictions will offer shipping operators opportunities to improve routes, potentially reducing detours and influencing maritime dynamics, including changes in the Red Sea situation.