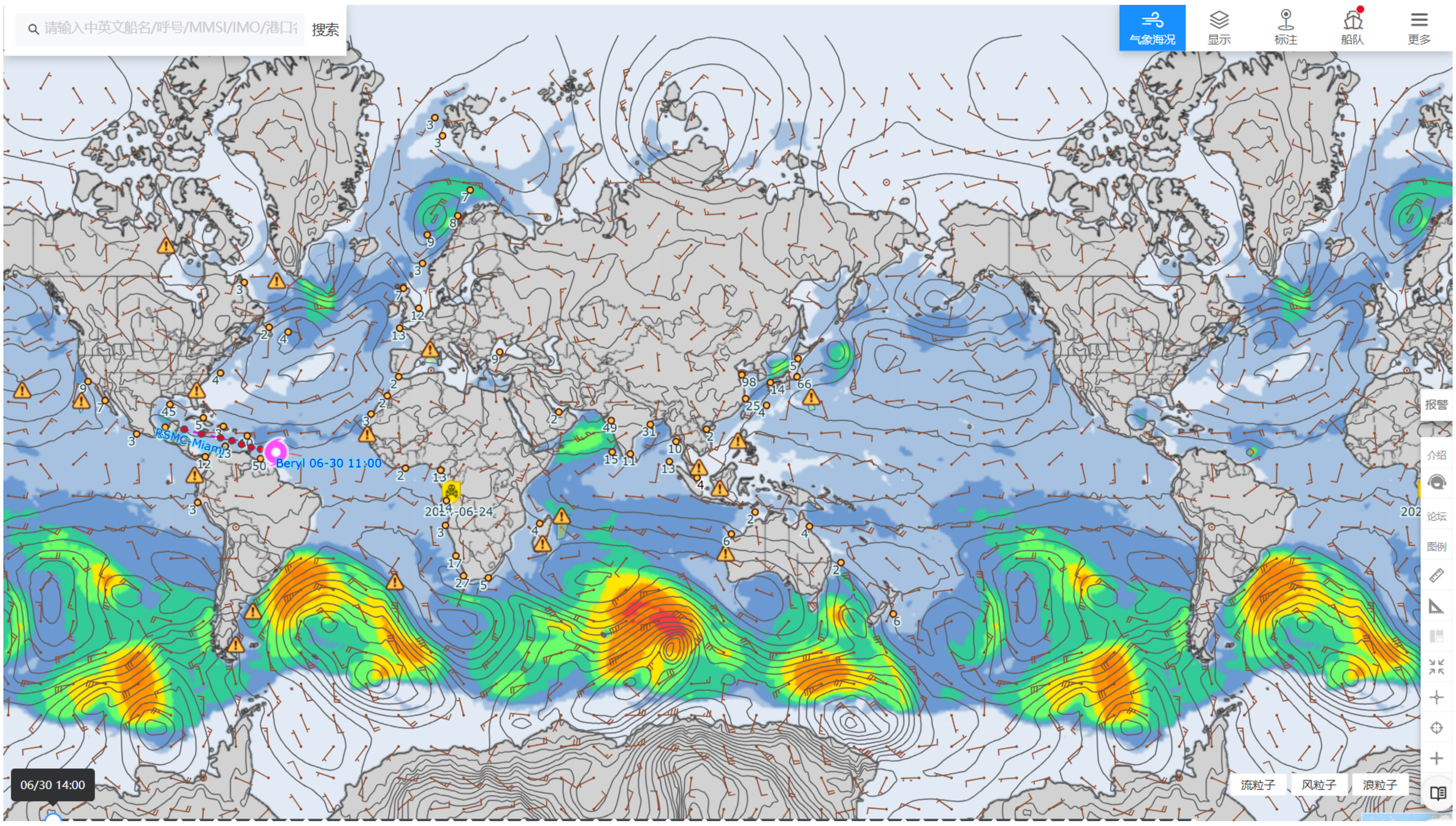
2024年 第26周市场周报

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795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 795 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

未来一周中国渤海海域风力从4-5级逐步减弱到3-4级，相关海域1米轻浪；黄海风力从3-4级增强到6-7级，相关海域有时3米大浪；东海风力维持5-6级，相关海域有时大浪；台湾海峡风力有时6级，台湾海峡海浪可能有3米大浪；南海大部海域风力维持在4-5级，中浪。西北太平洋有低压在发展，那里海况风浪大。The coming week the wind in Bohai Sea might ease to moderate breeze with slight seas. Yellow Sea might strengthen to near gale with rough seas sometimes. And China East Sea might stay strong breeze with rough seas. The wind in the Taiwan Strait might experience strong breeze and the sea there happens to experience rough. In most of the South China Sea the wind stays fresh breeze with moderate seas. There are low-pressures developing in the East North of the Pacific Ocean and the seas there are rough.

海盗事件 Piracy

6月24日，安哥拉卢安达锚地，一艘停泊的集装箱船遭到了一名罪犯通过锚链登上船的入侵。船上的财物被盗。该事件已向港口当局报告。20.06.2024: 0150-0230 UTC: Posn: 08:44.3S – 013:18.9E, Luanda Anchorage, Angola. An anchored container ship was boarded by a perpetrator via the anchor chain. Ship's properties reported stolen. Incident reported to the port authorities.

海上事件 Marine Incidents

6月28日，英国海上贸易行动(UKMTO)表示，有一起胡塞武装无人机袭击船舶事件发生在也门荷台达港西北方150海里处。On June 28th, the United Kingdom Maritime Trade Operations (UKMTO) reported an incident of Houthi armed drone attack on a vessel approximately 150 nautical miles northwest of the port of Hodeidah in Yemen.

其它 Others

没有 Nil

备注 Remark

本报告数据截止时间为2024年6月30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 30th of 2024; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

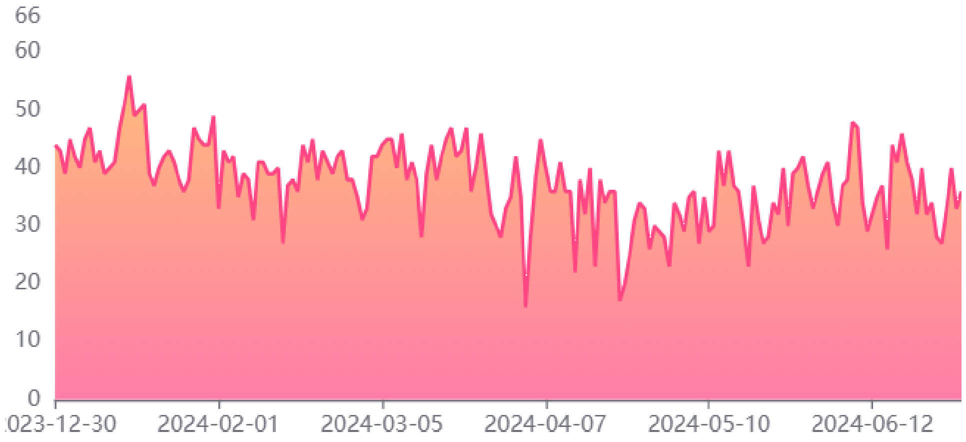
第二部分 航运数据 SHIPPING DATA

最近一周船舶运河/河口锚地等待数量

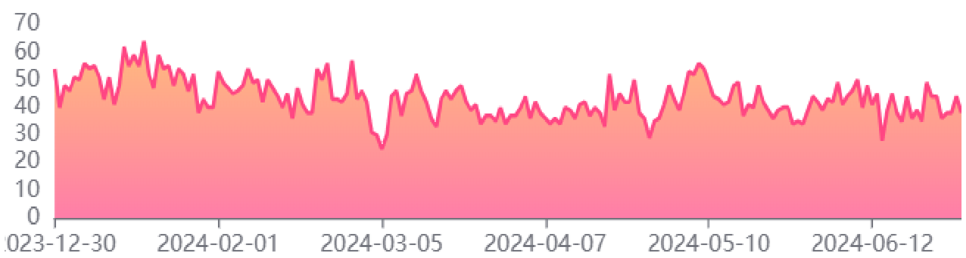
Latest Week Update Vessel Waiting Numbers Information in Anchorages of Canals and Rivers

Canal/Riv.	P.N.	M.N.	WoW	MoM
Suez.Red	38	1198	10	-47
Miss.Riv.	3	61	1	-41
CJK	183	5031	447	816
Pa.Atlan.	59	1522	6	-67
Colum.Riv.	3	113	-9	-33
Suez.Med.	36	1052	-51	57
Pa.Pac.	47	1449	-30	11
ZJK	55	3278	-104	229

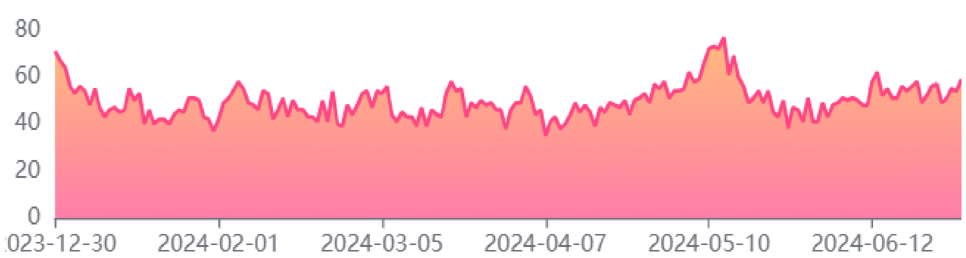
Suez(Mediterranean-Red Sea)



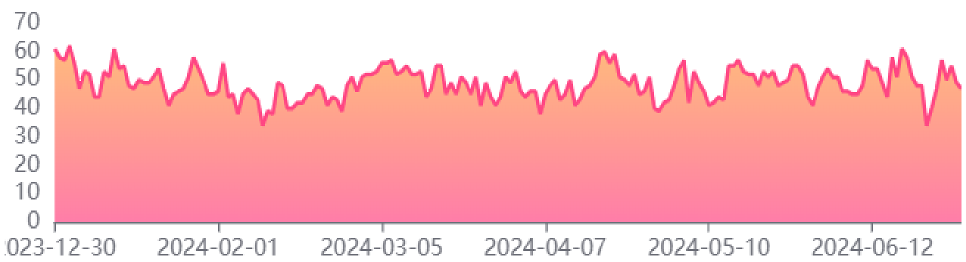
Suez(Red Sea-Mediterranean)



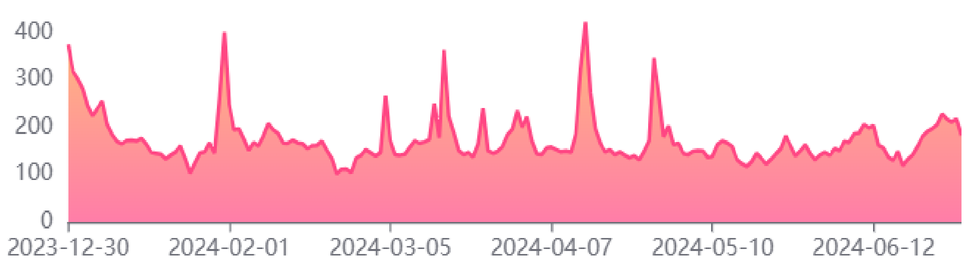
Panama(Atlantic-Pacific)



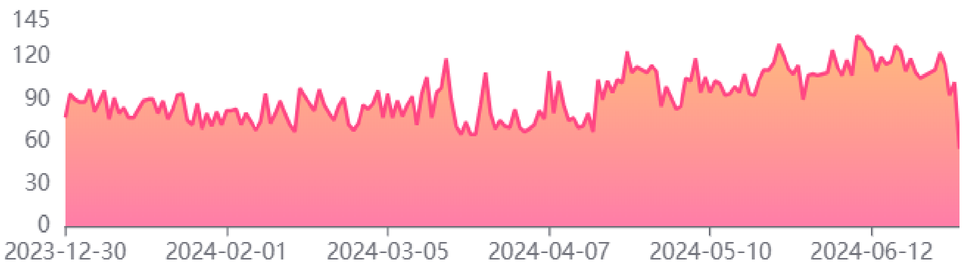
Panama(Pacific-Atlantic)



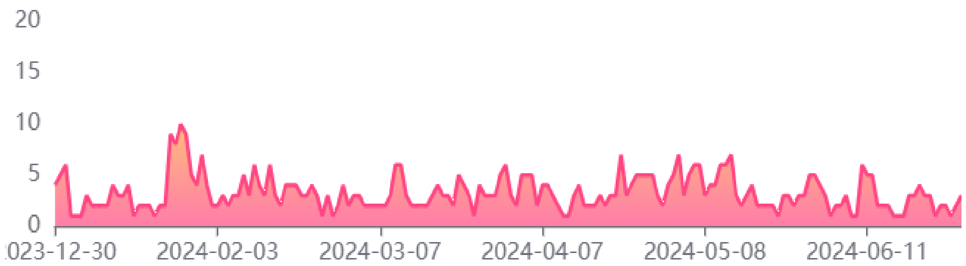
Changjiangkou(Estuary)



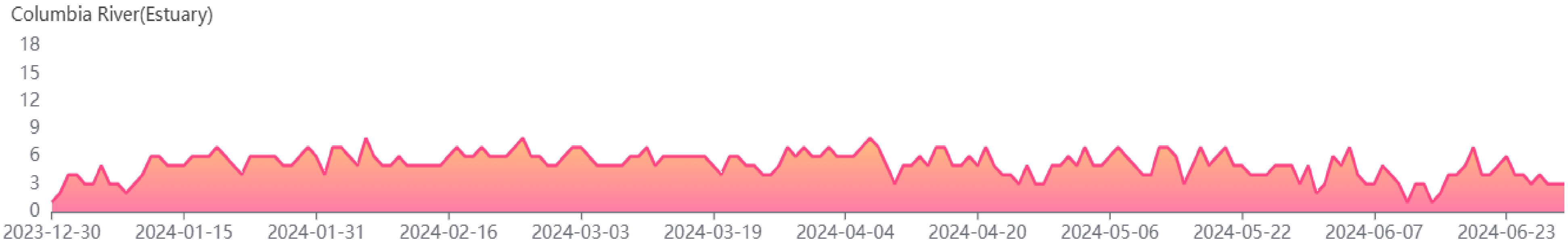
Zhujiangkou(Estuary)



Mississippi River(Estuary)



Columbia River(Estuary)

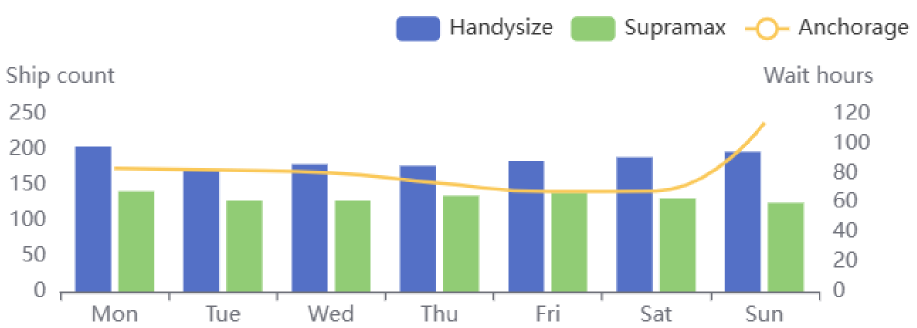


(P.N-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

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

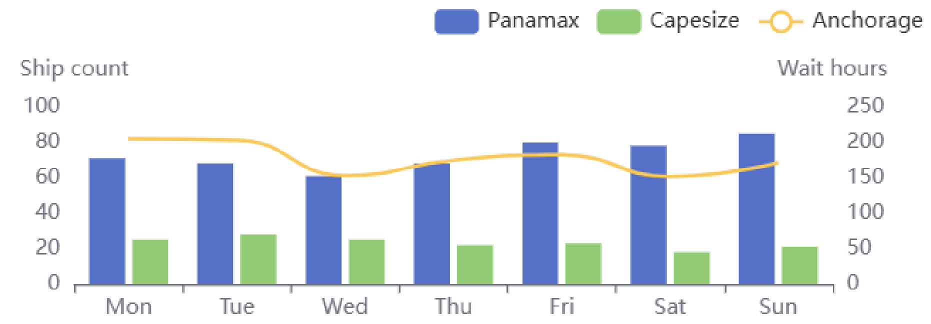
Type	M	T	W	Th	F	Sat	Sun
HDY	204	171	179	177	184	189	197
SMX	141	128	128	135	139	131	125
WT.h.	83.3	82	80.1	73.2	67.6	68	114



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

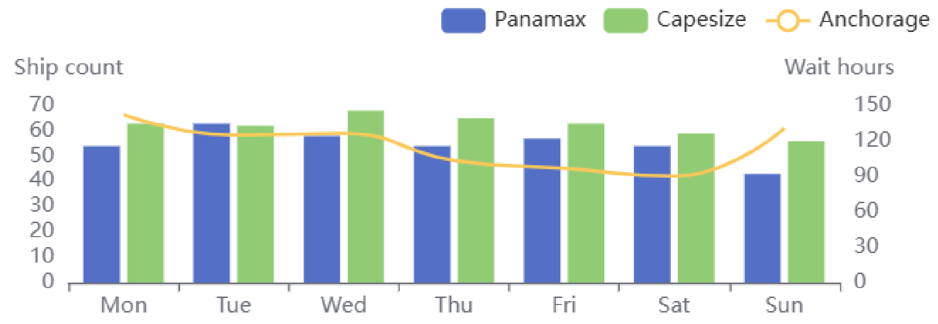
Type	M	T	W	Th	F	Sat	Sun
Pan.	71	68	61	68	80	78	85
Cap	25	28	25	22	23	18	21
WT.h.	205.1	203.2	153.1	174.65	182.3	151.7	171



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

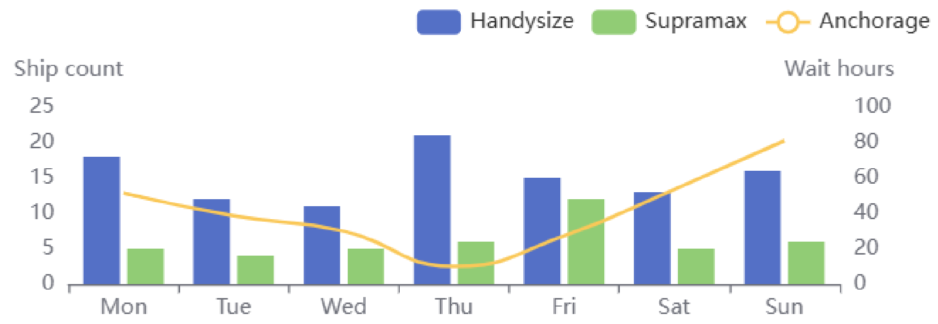
Type	M	T	W	Th	F	Sat	Sun
Pan.	54	63	58	54	57	54	43
Cap	63	62	68	65	63	59	56
WT.h.	142.4	125	126.5	103.6	96.8	90.2	131



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

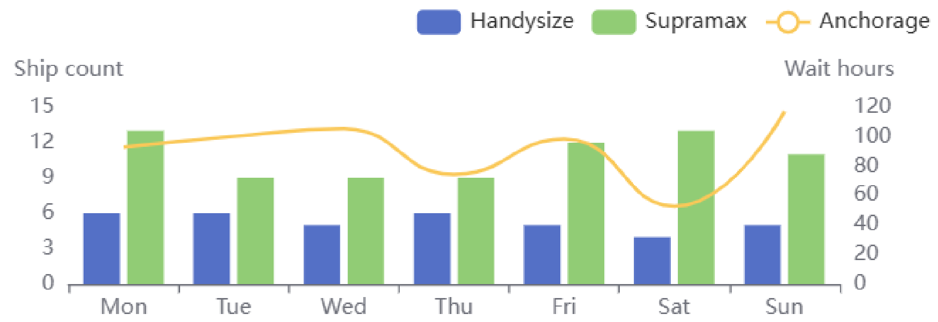
Type	M	T	W	Th	F	Sat	Sun
HDY	18	12	11	21	15	13	16
SMX	5	4	5	6	12	5	6
WT.h.	51.4	38.6	29.9	10	27.3	53.55	81



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

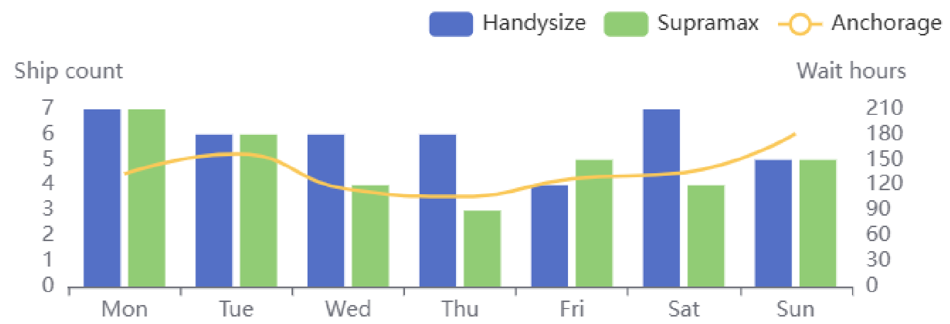
Type	M	T	W	Th	F	Sat	Sun
HDY	6	6	5	6	5	4	5
SMX	13	9	9	9	12	13	11
WT.h.	92.8	100.2	105.25	74.4	98.4	52.7	117



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

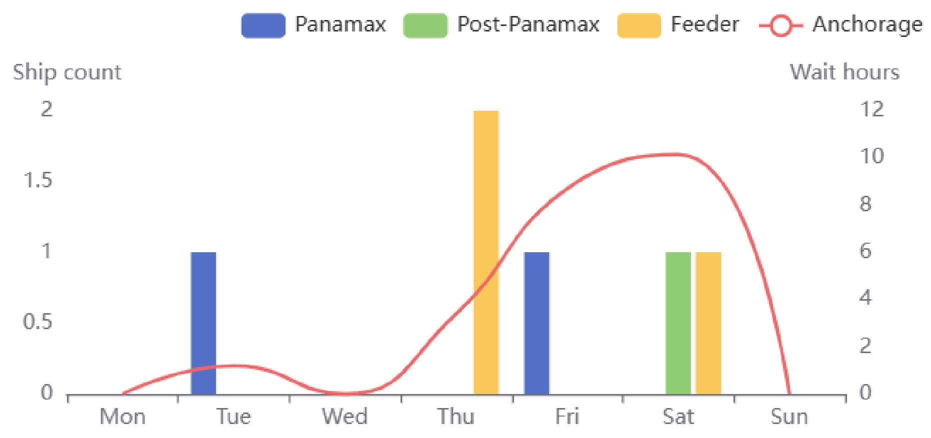
Type	M	T	W	Th	F	Sat	Sun
HDY	7	6	6	6	4	7	5
SMX	7	6	4	3	5	4	5
WT.h.	133.25	157.25	115.3	106.5	127.6	135	181



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

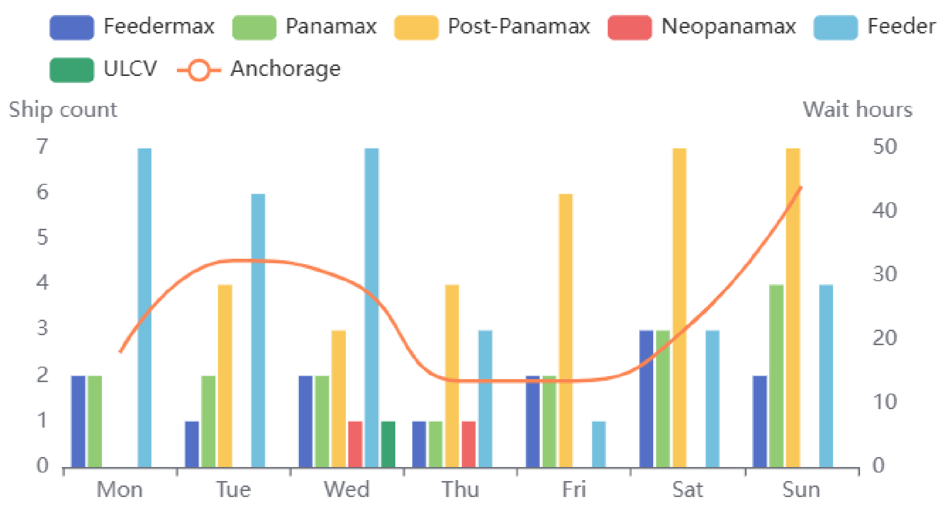
Type	M	T	W	Th	F	Sat	Sun
F.ma.	0	0	0	0	0	0	0
Pan.	0	1	0	0	1	0	0
PPx	0	0	0	0	0	1	0
NPx	0	0	0	0	0	0	0
Fd	0	0	0	2	0	1	0
WT.h.	0.0	1.2	0.0	3.4	8.7	10.15	0.0
Ulcv	0	0	0	0	0	0	0



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

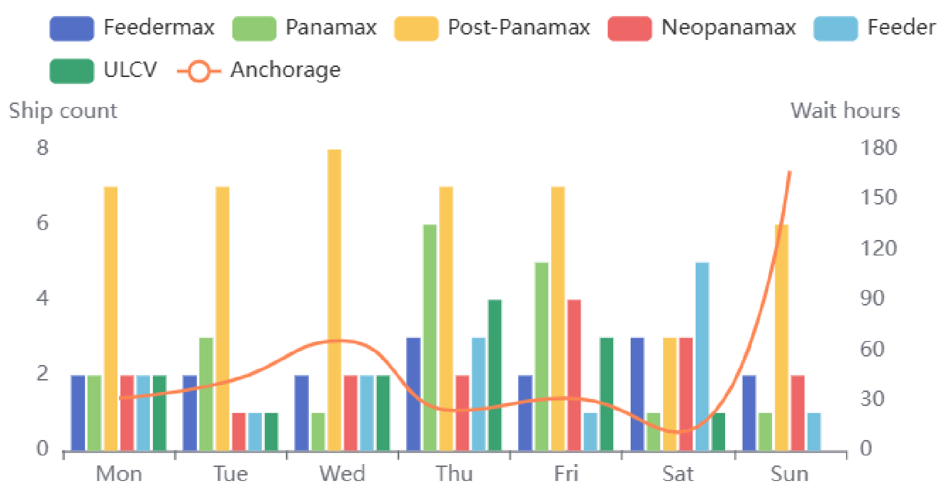
Type	M	T	W	Th	F	Sat	Sun
F.ma.	2	1	2	1	2	3	2
Pan.	2	2	2	1	2	3	4
PPx	0	4	3	4	6	7	7
NPx	0	0	1	1	0	0	0
Fd	7	6	7	3	1	3	4
Ulcv	0	0	1	0	0	0	0
WT.h.	17.9	32.4	29.3	13.5	13.5	22	44



最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

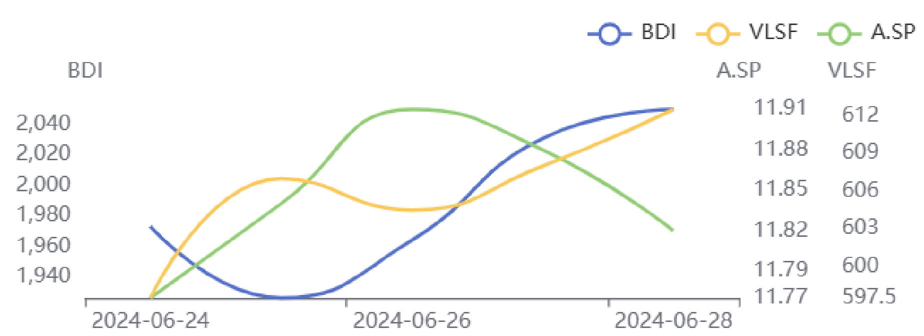
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

Type	M	T	W	Th	F	Sat	Sun
F.ma.	2	2	2	3	2	3	2
Pan.	2	3	1	6	5	1	1
PPx	7	7	8	7	7	3	6
NPx	2	1	2	2	4	3	2
Fd	2	1	2	3	1	5	1
Ulcv	2	1	2	4	3	1	0
WT.h.	31.4	41.7	65.7	23.9	31.4	11.1	167



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

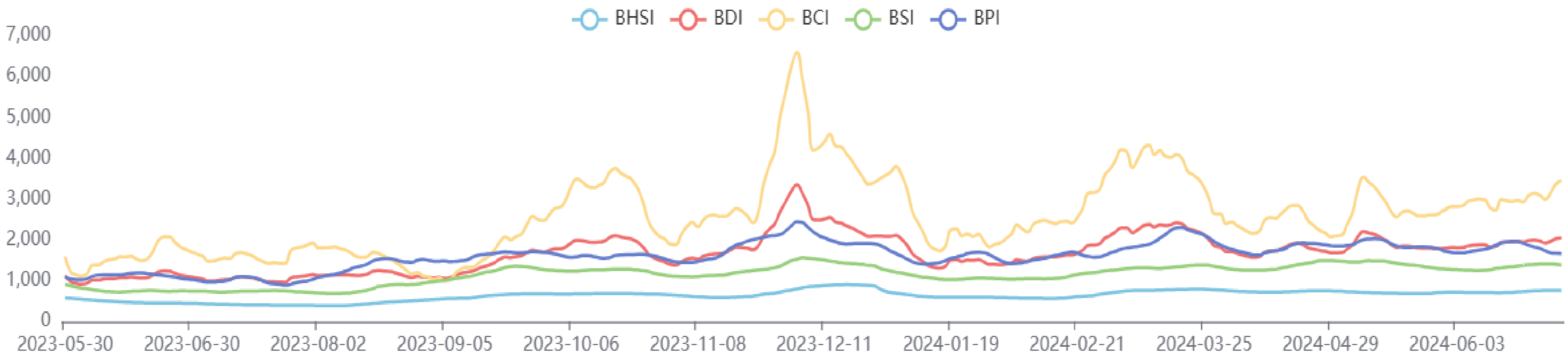
Type	M	T	W	Th	F	Sat	Sun
BDI	1792	1735	1683	1672	1667		
VLSF	597.50	607.00	604.50	608.00	612.50		
A.SP	11.77	11.84	11.91	11.88	11.82	11.78	



第三部分 航运市场 SHIPPING MARKET

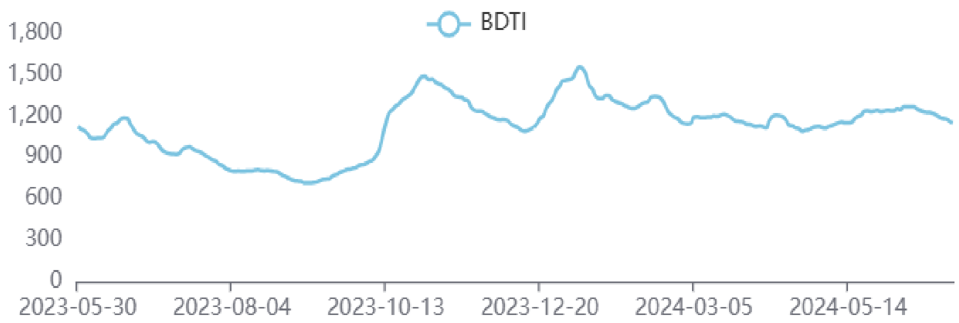
波罗的海干散货指数Baltic Dry Index

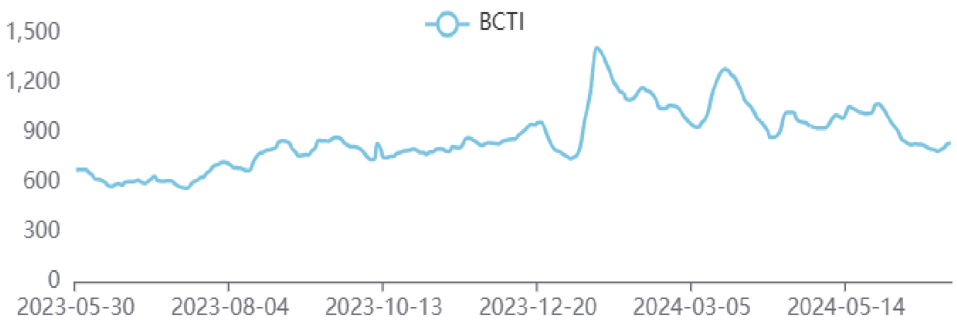
Type	PI	WoW	W%	M%	y%
BDI	2050	53.0	2.65	12.95	80.14
BCI	3443	301.0	9.58	22.09	88.97
BPI	1667	-160.0	-8.76	-1.54	57.56
BSI	1385	-13.0	-0.93	8.37	84.18
BHSI	763	10.0	1.33	5.97	68.81

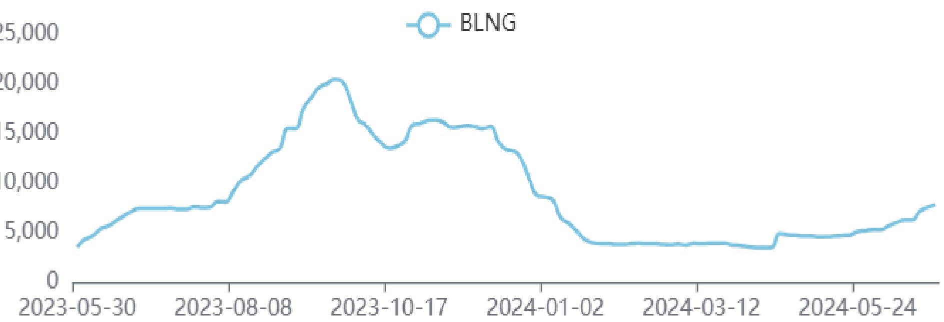


能源运价指数Energy Shipping Index

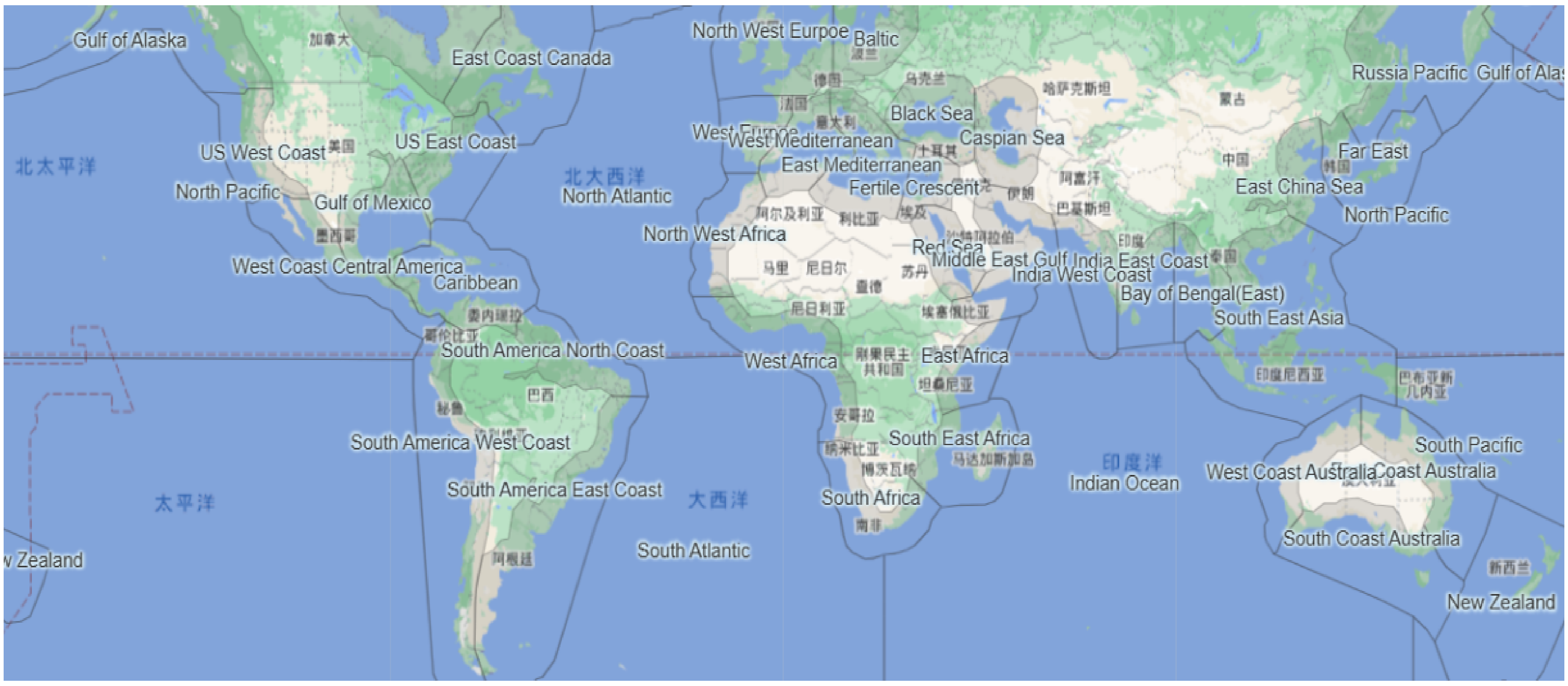
Type	PI	WoW	W%	M%	y%
BDTI	1150	-55.0	-4.56	-7.33	13.08
BCTI	834	39.0	4.91	-18.48	40.64
BLNG	7803	679.0	9.53	47.7	5.4
BLPG	5010	-568.0	-10.18	-34.73	-54.95







第四部分 运力分布 SUPPLY DISTRIBUTION

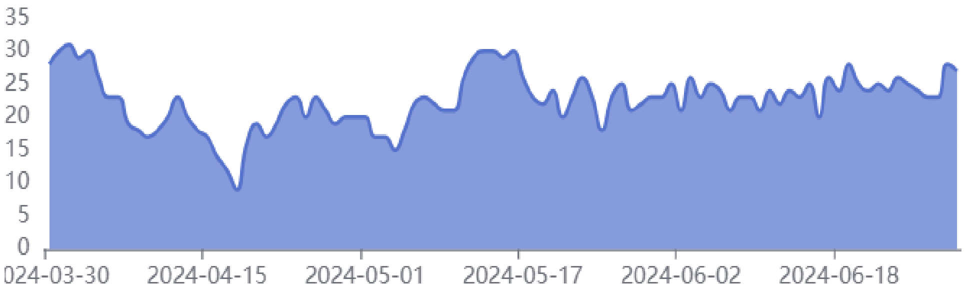


好望角型散货船 Capesize

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.

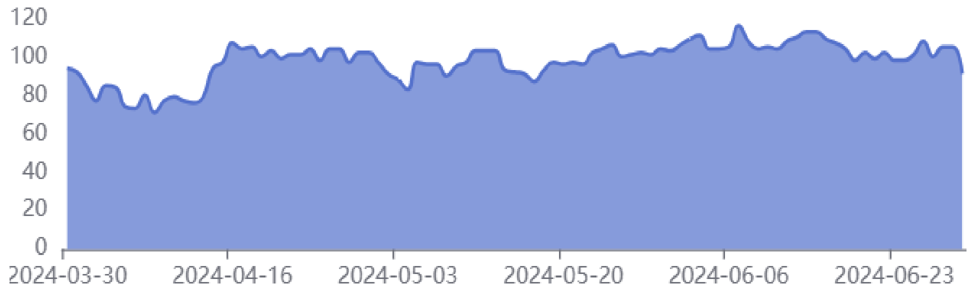
Type	M	T	W	Th	F	Sat	Sun
Cape	26	25	24	23	23	28	27



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.

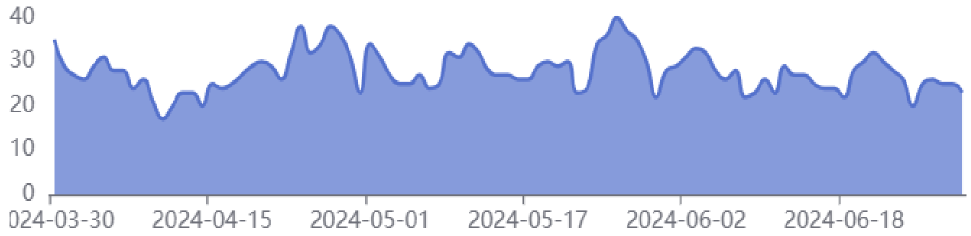
Type	M	T	W	Th	F	Sat	Sun
Cape	98	101	108	100	105	105	91



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	20	25	26	25	25	23

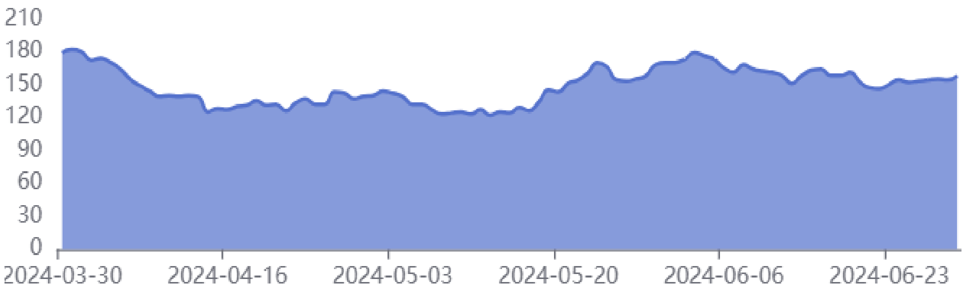


巴拿马型散货船 PANAMAX

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.

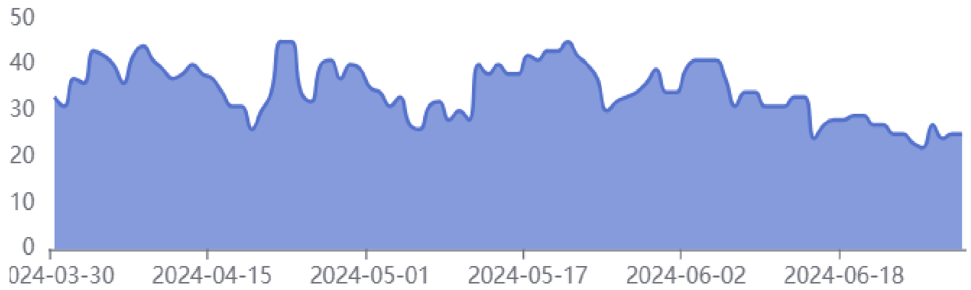
Type	M	T	W	Th	F	Sat	Sun
Pan.	154	152	153	154	155	154	158



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.

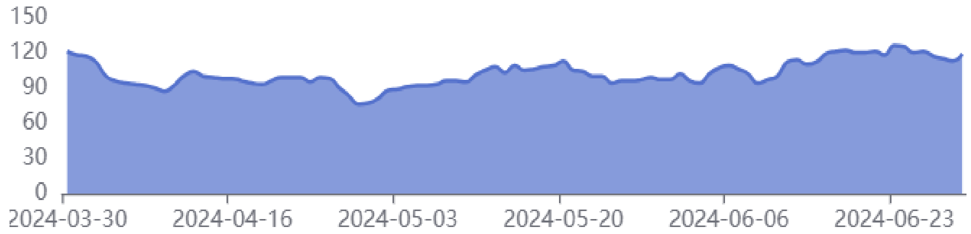
Type	M	T	W	Th	F	Sat	Sun
Pan.	25	23	25	26	25	24	24



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.	125	120	121	117	115	113	119

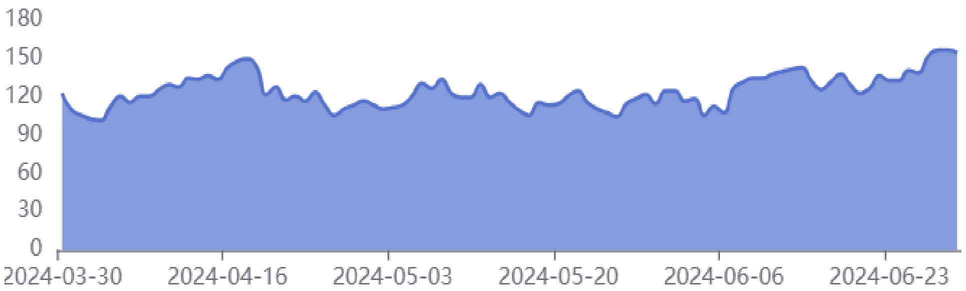


超大灵便型散货 SUPRAMAX

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.

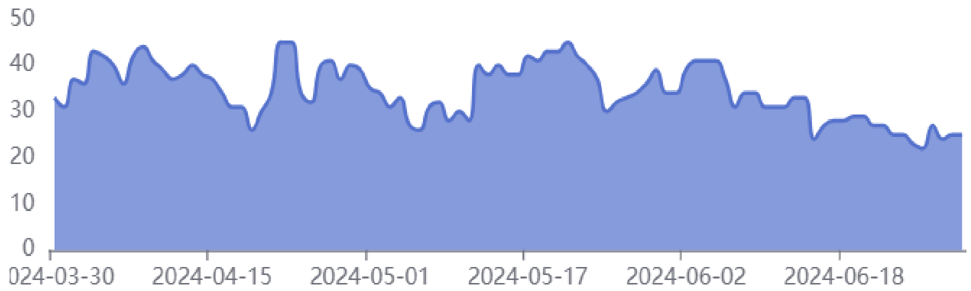
Type	M	T	W	Th	F	Sat	Sun
SMX	132	140	138	151	156	156	154



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.

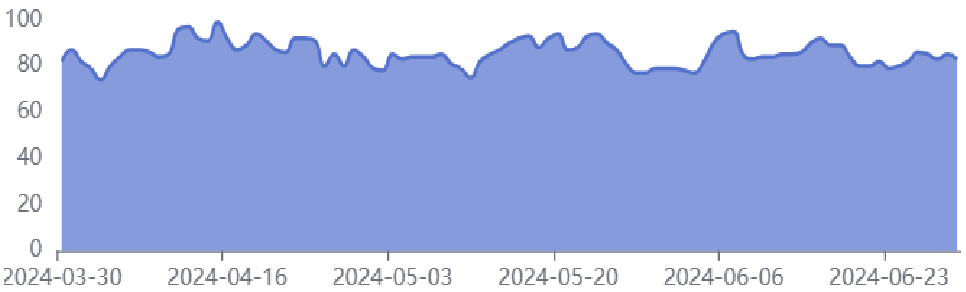
Type	M	T	W	Th	F	Sat	Sun
SMX	25	23	22	27	24	25	25



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.

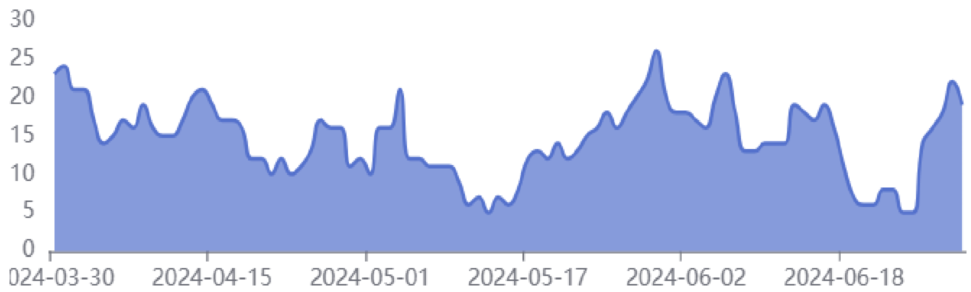
Type	M	T	W	Th	F	Sat	Sun
SMX	5	5	14	16	18	22	19



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.

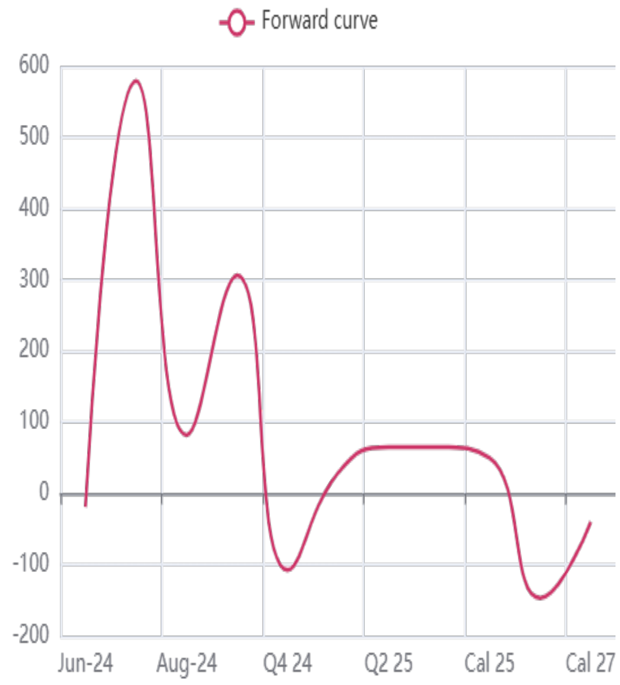
Type	M	T	W	Th	F	Sat	Sun
SMX	80	82	86	85	83	85	83



第五部分 远期运价协议 FFA

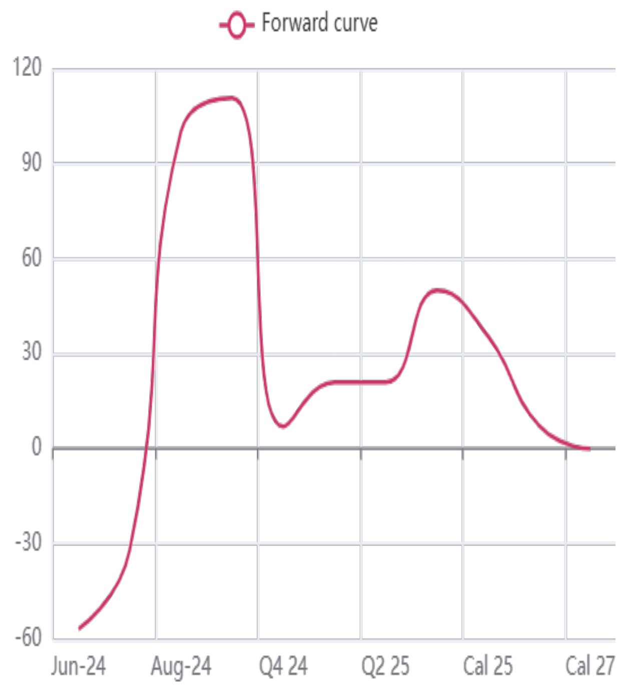
好望角型散货船Capesize

5TC	$/day	WoW	
Jun-24	24,924.00	-19.0	-0.1 %
Jul-24	27,786.00	579.0	2.1 %
Aug-24	25,507.00	82.0	0.3 %
Q3 24	26,450.00	306.0	1.2 %
Q4 24	27,499.67	-107.33	-0.4 %
Q1 25	15,993.00	29.0	0.2 %
Q2 25	21,529.00	65.0	0.3 %
Q3 25	24,879.00	65.0	0.3 %
Cal 25	21,863.75	49.75	0.2 %
Cal 26	20,846.25	-146.75	-0.7 %
Cal 27	19,996.00	-40.0	-0.2 %



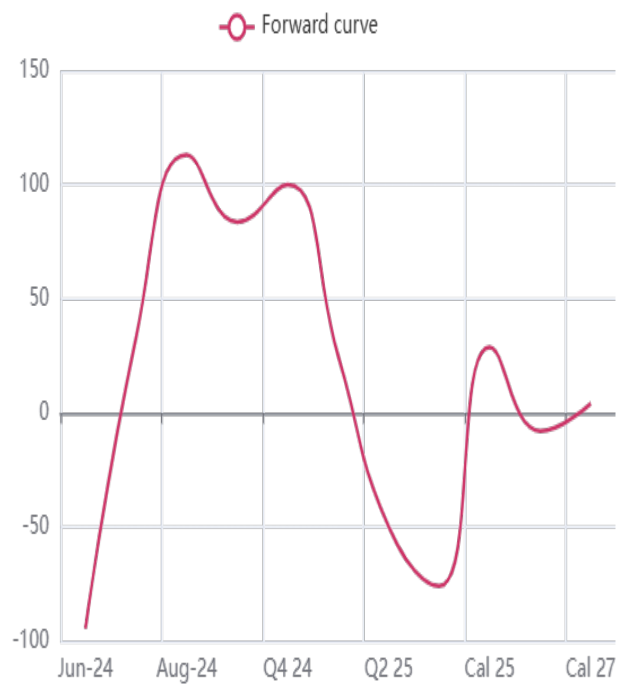
巴拿马型散货船Panamax

4TC	$/day	WoW	
Jun-24	14,832.20	-56.8	-0.4 %
Jul-24	14,614.00	-32.0	-0.2 %
Aug-24	15,239.00	100.0	0.7 %
Q3 24	15,259.33	110.67	0.7 %
Q4 24	15,750.00	7.0	0.0 %
Q1 25	12,514.00	21.0	0.2 %
Q2 25	14,107.00	21.0	0.1 %
Q3 25	13,800.00	50.0	0.4 %
Cal 25	13,460.50	35.5	0.3 %
Cal 26	12,571.25	7.25	0.1 %
Cal 27	12,304.00	0.0	0.0 %



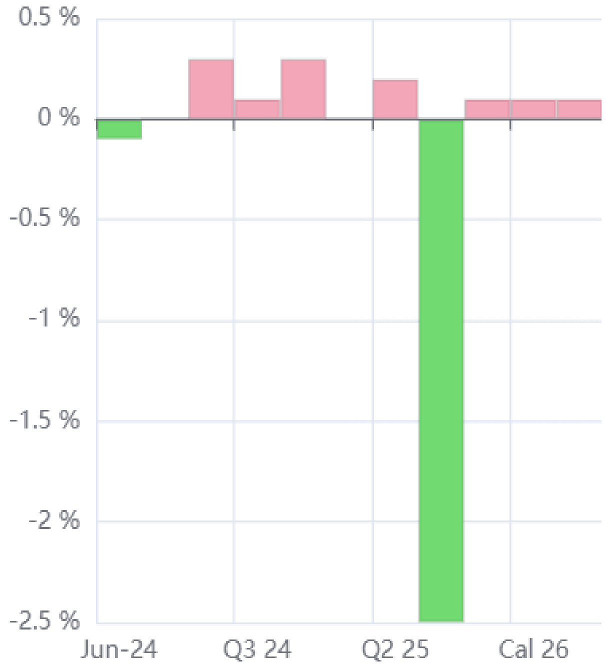
超大灵便型散货船Supramax

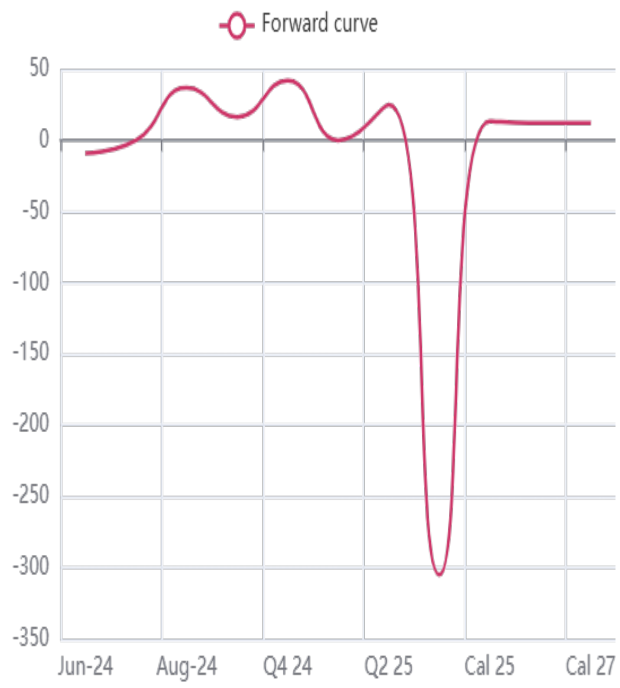
10TC	$/day	WoW	
Jun-24	14,663.50	-94.5	-0.6 %
Jul-24	14,983.00	33.0	0.2 %
Aug-24	15,071.00	113.0	0.8 %
Q3 24	15,064.00	83.67	0.6 %
Q4 24	15,071.00	100.0	0.7 %
Q1 25	11,933.00	25.0	0.2 %
Q2 25	13,425.00	-50.0	-0.4 %
Q3 25	13,067.00	-76.0	-0.6 %
12,946.00	Cal 25	28.75	0.2 %
Cal 26	12,375.00	-8.0	-0.1 %
Cal 27	12,208.00	4.0	0.0 %



灵便型散货船Handysize

7TC	$/day	WoW	
Jun-24	13,153.80	-9.2	-0.1 %
Jul-24	13,975.00	0.0	0.0 %
Aug-24	13,975.00	37.0	0.3 %
Q3 24	13,975.00	16.33	0.1 %
Q4 24	14,067.00	42.0	0.3 %
Q1 25	11,013.00	0.0	0.0 %
Q2 25	12,425.00	25.0	25.0
Q3 25	12,088.00	-305.0	-2.5 %
Cal 25	12,063.00	13.25	0.1 %
Cal 26	11,675.00	12.0	0.1 %
Cal 27	11,525.00	12.0	0.1 %

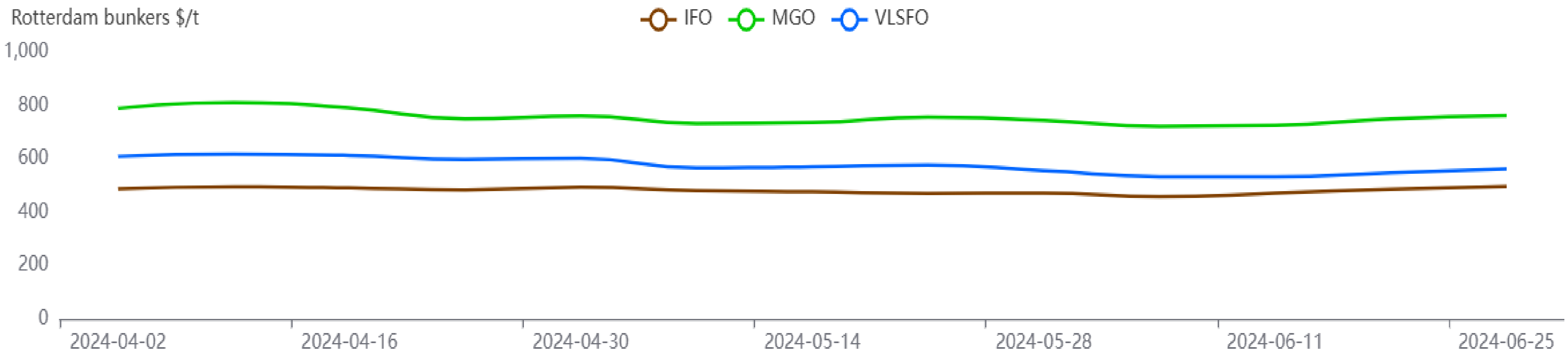


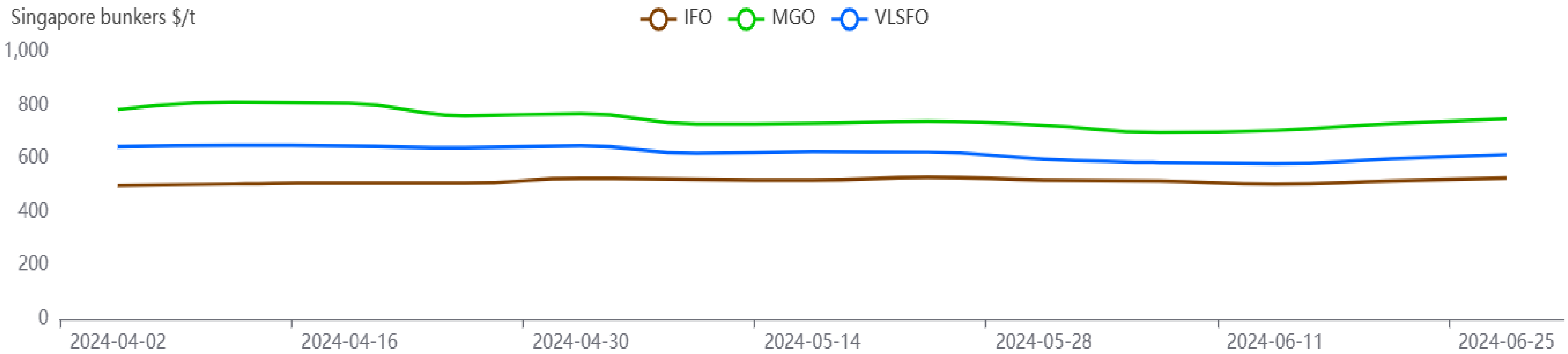


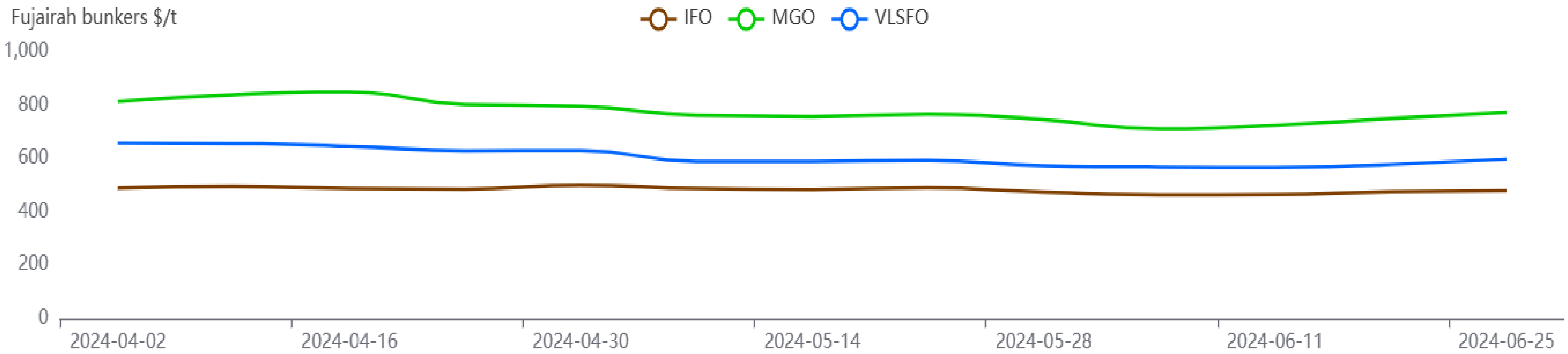
第六部分 燃油价格 BUNKER PRICE

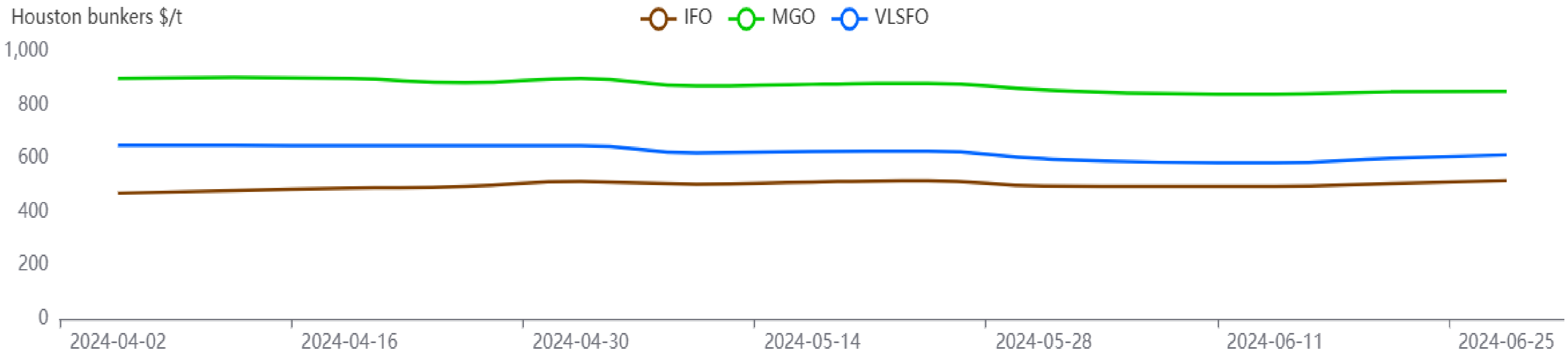
MP	LO	HO	MO	SP	WoW	W%	M%
zhoushan	608.0	550.5	782.0	57.5	-12.0	-17.27	-18.44
Singapore	616.0	528.5	750.5	87.5	5.5	6.71	11.46
Rotterdam	562.5	497.5	763.0	65.0	4.0	6.56	-23.08
Fujairah	598.0	479.5	773.5	118.5	16.5	16.18	20.3
Houston	614.0	518.0	851.5	96.0	1.5	1.59	-5.88

(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	203.0		-10.0	-4.69	-11.35	-16.77
Maize	201.0		-9.0	-4.29	-4.74	-20.83
Soybeans	228.0		0.0	0.0	-3.8	-16.22
Rice	254.0		-3.0	-1.17	-1.17	24.43
Barley	212.0		-6.0	-2.75	-8.62	-6.97
Energy		Index	+/-	Weekly	Monthly	YTD
Crude Oil	USD/Bbl	81.59	2.42	3.06	4.64	13.16
Brent	USD/Bbl	86.02	2.74	3.29	4.51	11.69
Natural Gas	USD/MMBtu	2.82	0.02	0.71	11.46	7.22
Gasoline	USD/Gal	2.51	0.09	3.72	0.8	-6.34
Heating Oil	USD/Gal	2.52	0.03	1.2	4.13	-0.79
Ethanol	USD/Gal	1.96	0.04	2.08	8.89	-21.6
Naphtha	USD/T	661.98	13.45	2.07	0.03	17.35
Propane	USD/Gal	0.75	0.0	0.0	5.63	29.31
Uranium	USD/Lbs	83.6	-3.05	-3.52	-8.78	44.76
Methanol	CNY/T	2483.0	-9.0	-0.36	-6.09	20.89
TTF Gas	EUR/MWh	34.92	0.35	1.01	0.84	8.62
UK Gas	GBp/thm	81.54	-0.1	-0.12	-0.34	1.7
Industrial		Index	+/-	Weekly	Monthly	YTD
Copper	USD/Lbs	4.43	0.01	0.23	-7.13	18.77
Coal	USD/T	131.9	-3.25	-2.4	-7.96	8.43
Steel	CNY/T	3365.0	-44.0	-1.29	-5.87	-9.62
Iron Ore	USD/T	106.55	-0.78	-0.73	-9.44	-15.74
Aluminum	USD/T	2511.0	15.5	0.62	-5.67	13.16
Lithium	CNY/T	93500.0	-4000.0	-4.1	-11.37	N/A
Metals		Index	+/-	Weekly	Monthly	YTD
Gold	USD/t.oz	2323.4	2.6	0.11	-0.65	18.53
Silver	USD/t.oz	29.5	0.1	0.34	-4.22	20.56
Platium	USD/t.oz	1003.5	36.7	3.8	-5.43	5.45
Currencies	Index		+/-	Weekly	Monthly	YTD
EUR/USD	1.07		0.0	0.0	-1.83	-1.83
USD/CNY	7.29		0.02	0.28	0.69	1.67

第八部分 本周话题 WEEKLY TOPIC

2024年超大和极限灵便船航运市场

超大和极限灵便散货船聚焦小宗散杂货，其市场特点是客户众多且分布广，货物品种众多，除了和大宗散货有所交叉，小宗散货还有糖类，化肥，木材，大米，硫磺，水泥，盐粉，废铁，木屑，纸浆等；杂货有车辆，设备，钢卷，钢板，木板等。

当前全球正在营运的超大和极限灵便散货船有4150艘上下，总计2.35亿载重吨，平均船龄12年。从2020到2024年该种船型载重吨平均每年以大约3%的水平增长，从2025年到2026年预计会以4%的水平增长。

与2022年同期相比，2023年全年的干散货装货量有所增加，主要集中在中国进口的煤炭。 2023年小宗散货运输量实际明显减少，使得2023年间超大和极限灵便散货船的运费下降49%，但2024年初到目前该种船型的运费市场相比2023年有大幅度回升，今年第一季度同比上升27%的水平，第二季度同比更是上升39%。这可能归因于两个方面，一则是中国开年后重新在国际贸易市场活跃起来，二则是红海因数引起的绕航增加了市场对此种船型的需求。

2023年厄尔尼诺现象引起的干旱还记忆犹新，该异常气象致使阿根廷和美国大部分区域的粮食产量下降或者密西西比河水位下降直接影响了其粮食的出口，这两个地区粮食出口同比分别下降45%和25%，这反而促使巴西谷物出口出现创纪录水平，与2022年相比增长了28%。

2021年到2022年，该种船型每年新造船交船数量大概在7百万载重吨水平，2023年达到9百万载重吨水平，2024年上半年已经交付接近450万载重吨，也有望达到9百万载重吨的交付量，占整个船队3.6%的健康水平。

2024年有1000艘超大和极限灵便船超过15年船龄，到2027年将有2000艘船舶超过15年船龄，占比船队在50%左右。因为能效指数(EEXI)和碳强度指标(CII)的要求导致大多数船舶的航速降低，加上船队的老化也逐渐无法满足越来越严格的碳排放标准，考虑到目前可用的辅助技术和减速措施可能使船舶的CII合规性延长1至2年，到时候船舶会因此面临加速报废，这好像长期有利于新造船市场。结合当前新造船的高成本、以及更高的美金利率成本和其它船型挤占有限船台等因数，这些因素将继续阻碍新造船爆发式发展。可预见随着俄罗斯和乌克兰的战争的最终结束，重建乌克兰的运输需求将会持续抬升干散货船运输市场。

Supramax and Ultramax bulk carriers focus on small-sized miscellaneous goods, with a market characterized by a wide range of customers and goods. In addition to intersecting with bulk cargo, small miscellaneous cargo includes sugar, fertilizers, timber, rice, sulphur, cement, salt, scrap iron, wood chips, pulp, and various others; miscellaneous goods encompass vehicles, equipment, steel coils, steel plates, wooden boards, and more.

Currently, there are around 4,150 Supramax and Ultramax bulk carriers operating globally, totaling 2.35 billion deadweight tons with an average vessel age of 12 years. From 2020 to 2024, this vessel type is projected to see an average annual growth in deadweight tons of approximately 3%, increasing to 4% from 2025 to 2026.

In comparison to the same period in 2022, the total volume of dry bulk cargo loaded in 2023 increased significantly, primarily driven by coal imports in China. The transportation volume of small miscellaneous cargo in 2023 notably declined, leading to a 49% decrease in freight rates for Supramax and Ultramax bulk carriers in that year. However, since early 2024, freight rates for this vessel type have significantly rebounded compared to 2023, with a 27% increase year-on-year in the first quarter and a 39% increase in the second quarter. This could be attributed to China's reinvigoration in the international trade market post New Year and the increased demand for this vessel type due to the Red Sea factor causing additional detours.

The El Niño-induced drought in 2023 remains fresh in memory, resulting in reduced grain production in Argentina and parts of the US, along with lowered water levels in the Mississippi River affecting grain exports. Grain exports from these regions decreased by 45% and 25% respectively year-on-year, while Brazil saw a record-breaking 28% growth in grain exports compared to 2022.

Between 2021 and 2022, new deliveries of this vessel type were around 7 million deadweight tons annually, reaching 9 million deadweight tons in 2023, with close to 4.5 million deadweight tons already delivered in the first half of 2024 and an anticipated delivery volume of 9 million deadweight tons. This equates to a healthy level of 3.6% of the entire fleet.

By 2024, over 1,000 Supramax and Ultramax vessels will exceed 15 years of age, with this number expected to reach 2,000 vessels by 2027, representing about 50% of the fleet. The efficiency and carbon intensity requirements set by the Energy Efficiency Existing Ship Index (EEXI) and Carbon Intensity Indicator (CII) have reduced the operating speeds of most vessels, coupled with aging fleets failing to meet increasingly stringent carbon emission standards, which might lead to accelerated scrapping due to non-compliance. While available auxiliary technologies and speed reduction measures could extend CII compliance for vessels by 1 to 2 years, this may eventually lead to increased scrapping, seeming to favour the newbuild market in the long run. Factors such as high costs of newbuilds, higher US dollar interest rates, limited shipyard availability, among others, will likely continue to impede an explosive growth in new vessels. It can be foreseen that with the eventual conclusion of the Russia-Ukraine war, the transport demand for rebuilding Ukraine will sustainably elevate the dry bulk shipping market.