



2024年 第27周市场周报

Contents

第一部分

航运安全 SHIPPING SAFETY

第二部分

航运数据 SHIPPING DATA

第三部分

航运市场 SHIPPING MARKET

第四部分

运力分布 SUPPLY DISTRIBUTION

第五部分

远期运价协议 FFA

第六部分

燃油价格 BUNKER PRICE

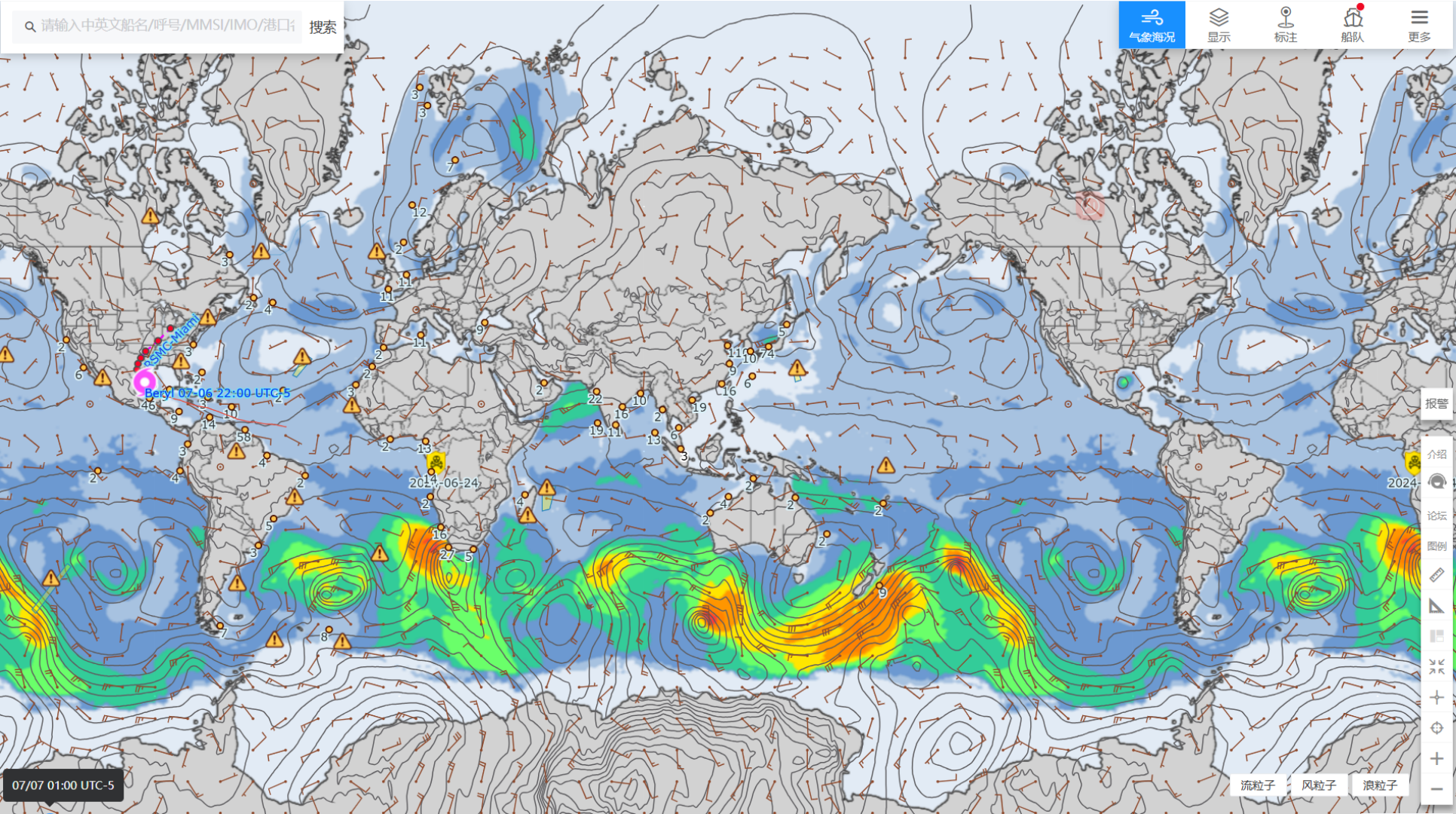
第七部分

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

未来一周中国渤海海域风力维持3-4级，相关海域1米轻浪；黄海风力维持4-5级，相关海域有时2米中浪；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5级，台湾海峡海浪可能有2米中浪；南海大部海域风力维持在4-5级，中浪。大西洋和太平洋当前没有明显低压在发展，那里海况平静。The coming week the wind in Bohai Sea stays moderate breeze with slight seas. Yellow Sea stays fresh breeze with moderate sea sometimes. And China East Sea might stay strong breeze with rough seas. The wind in the Taiwan Strait will experience fresh breeze and the sea there happens to experience moderate. In most of the South China Sea the wind stays fresh breeze with moderate seas. There are no low-pressures developing in the North of the Atlantic and Pacific Ocean and the seas there are calm.

海盗事件 Piracy

过去的一周没有收到最新的海盗事件报告。There are no new piracy reports in the latest week.

海上事件 Marine Incidents

HiFleet船舶数据显示，备受关注的集装箱船DALI轮当地时间6月24日早上7点（周一）自事故以来首次离开巴尔的摩港。目前该船已经抵达罗福港并正停靠泊位进行货物操作。The much-watched container ship DALI left the Port of Baltimore for the first time since the accident at 7 a.m. local time on Monday, June 24, according to HiFleet ship data. At present, the ship has arrived at the port of Norfolk and is docking for cargo handling.

其它 Others

没有 Nil

备注 Remark

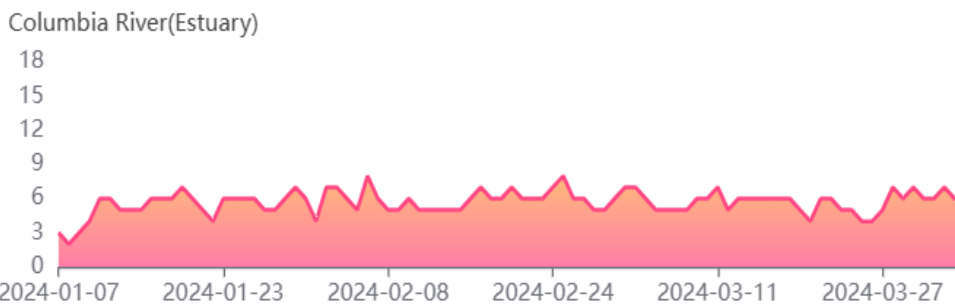
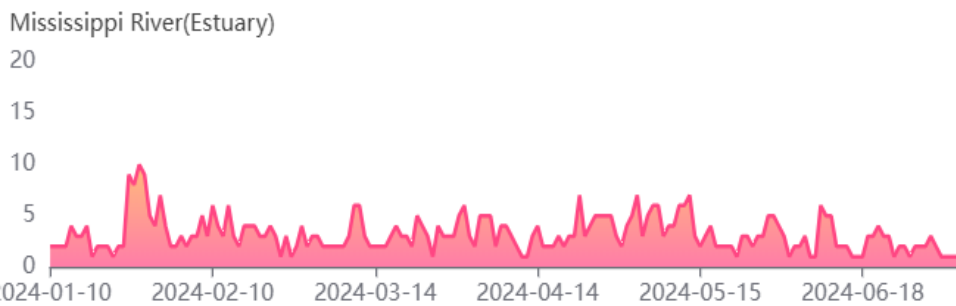
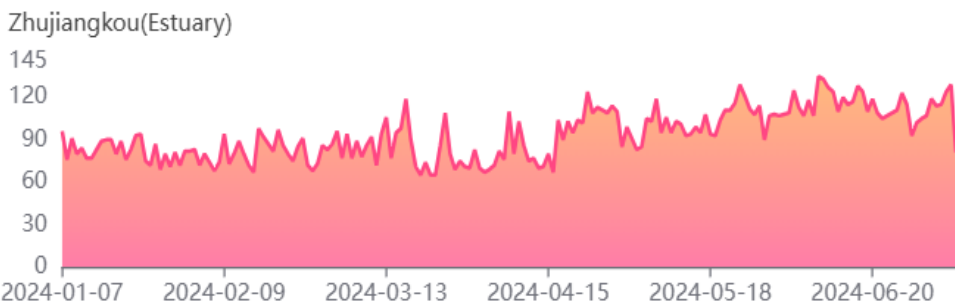
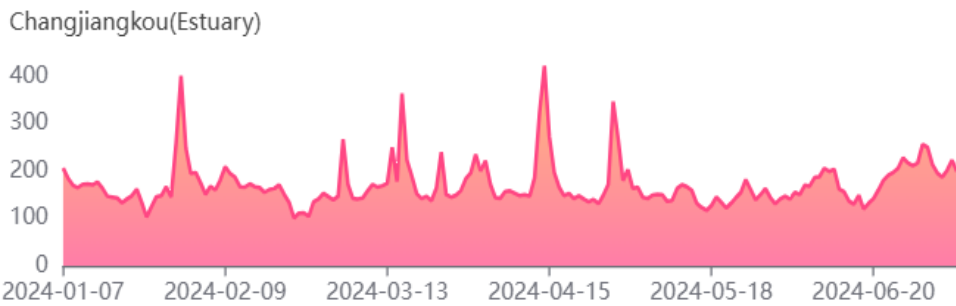
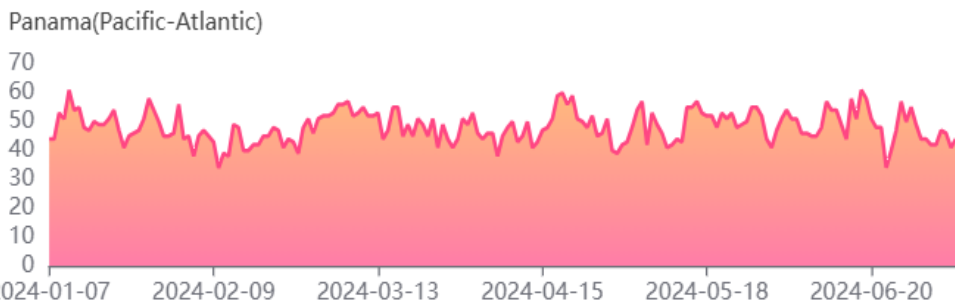
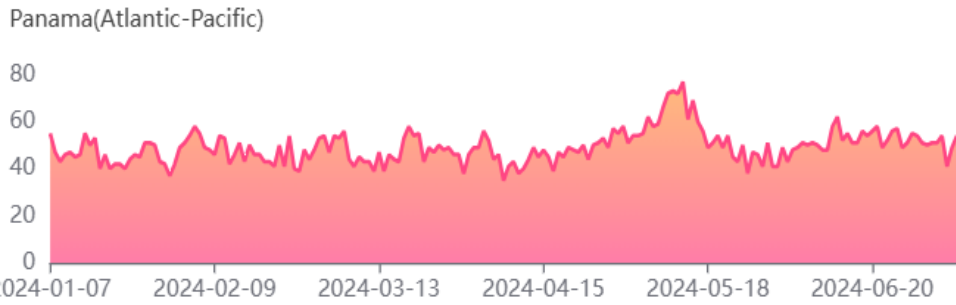
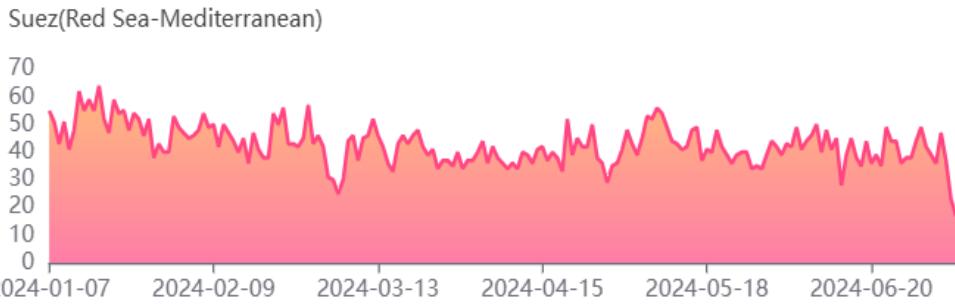
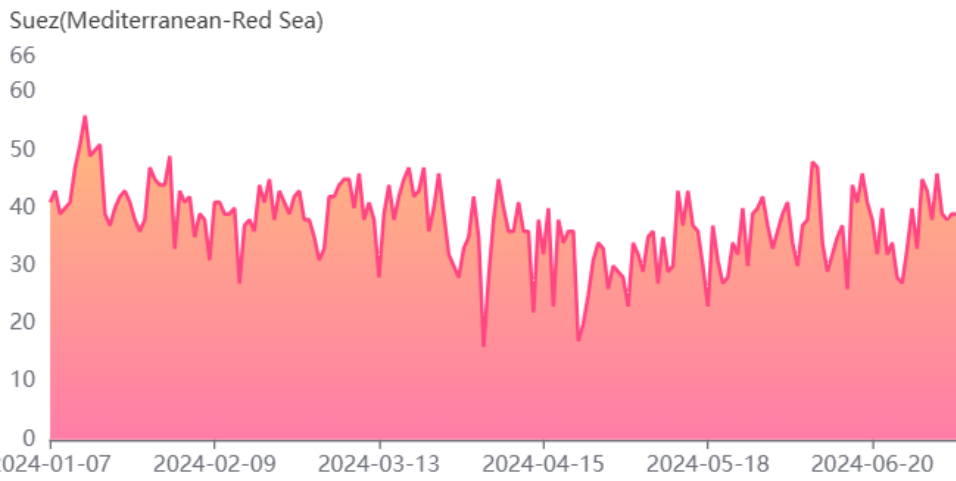
本报告数据截止时间为2024年7月7日北京时间17点；所有数据和或观点仅供参考，在任何情况下本公司及其员工不承担任何风险。 The data deadline for this report is Beijing time 17 hours on Jul 7th of 2024; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

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	17	1146	-52	-61
Miss.Riv.	1	63	-3	-12
CJK	199	5459	4	1115
Pa.Atlan.	54	1523	-24	37
Colum.Riv.	5	115	8	-25
Suez.Med.	39	1076	55	27
Pa.Pac.	44	1408	-26	-38
ZJK	81	3330	29	193

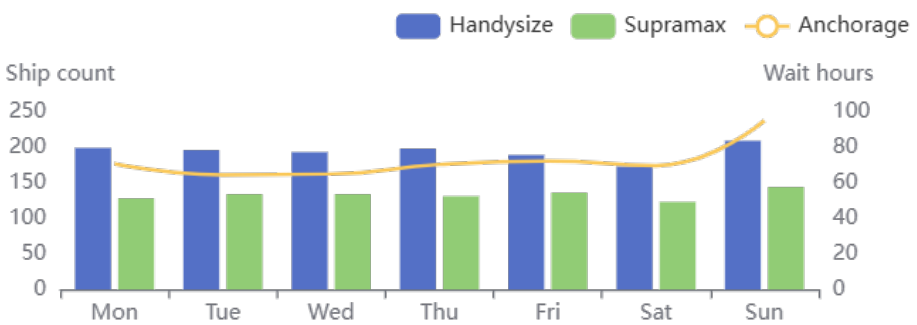


(P.N-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

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

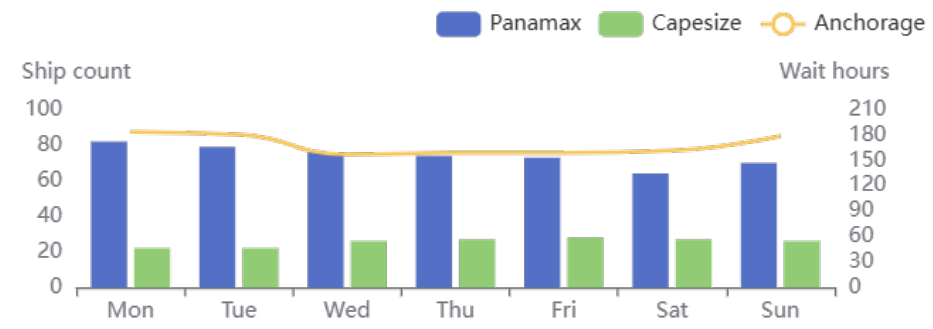
Type	M	T	W	Th	F	Sat	Sun
HDY	199	196	193	198	189	173	209
SMX	128	134	134	131	136	123	144
WT.h.	70.7	64.4	64.9	70.3	72.3	69.7	95



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

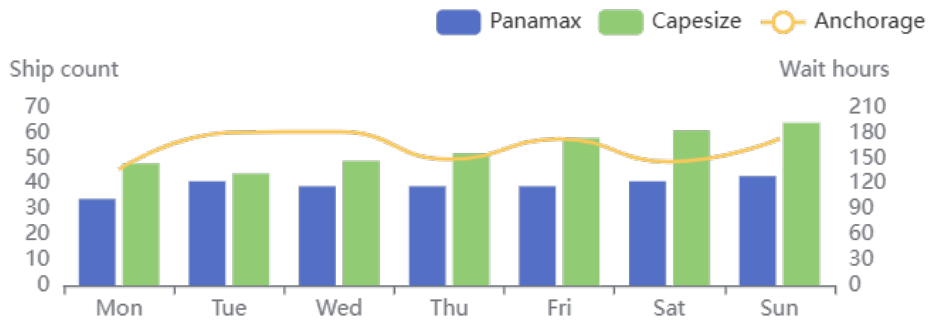
Type	M	T	W	Th	F	Sat	Sun
Pan.	82	79	76	74	73	64	70
Cap	22	22	26	27	28	27	26
WT.h.	183.7	180.5	156.9	159.3	159	161.6	179



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

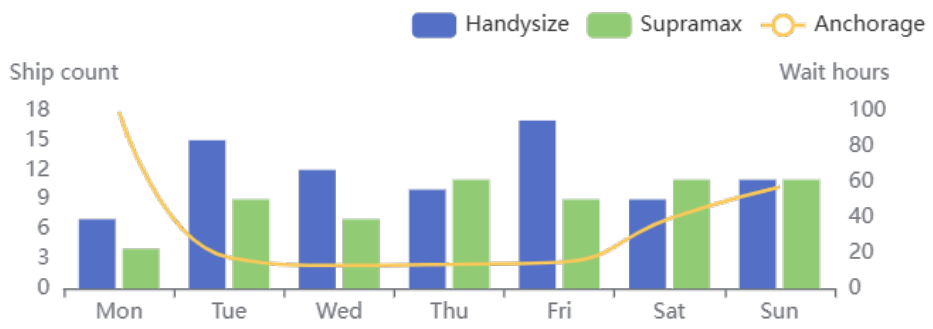
Type	M	T	W	Th	F	Sat	Sun
Pan.	34	41	39	39	39	41	43
Cap	48	44	49	52	58	61	64
WT.h.	136.95	180.4	181.6	148.9	172.9	146.1	173



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

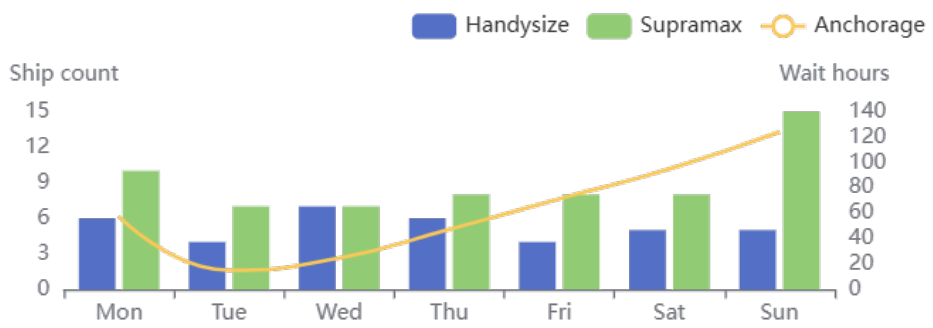
Type	M	T	W	Th	F	Sat	Sun
HDY	7	15	12	10	17	9	11
SMX	4	9	7	11	9	11	11
WT.h.	99.3	17.4	13	13.5	14.7	39.25	57



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

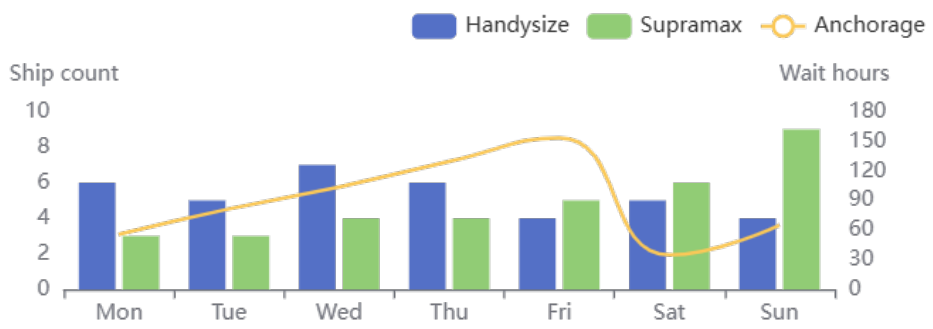
Type	M	T	W	Th	F	Sat	Sun
HDY	6	4	7	6	4	5	5
SMX	10	7	7	8	8	8	15
WT.h.	57.55	15	24.75	47.3	71.3	94.9	124



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

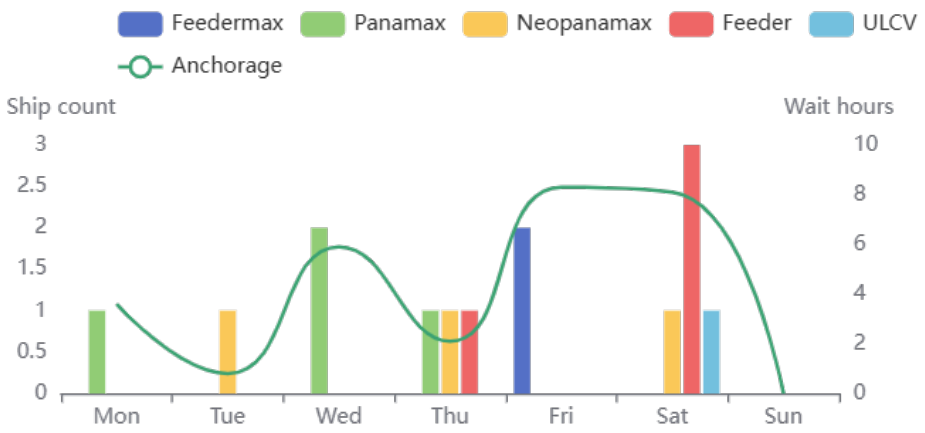
Type	M	T	W	Th	F	Sat	Sun
HDY	6	5	7	6	4	5	4
SMX	3	3	4	4	5	6	9
WT.h.	55.7	81.5	103.7	129.5	153.5	34.8	65



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

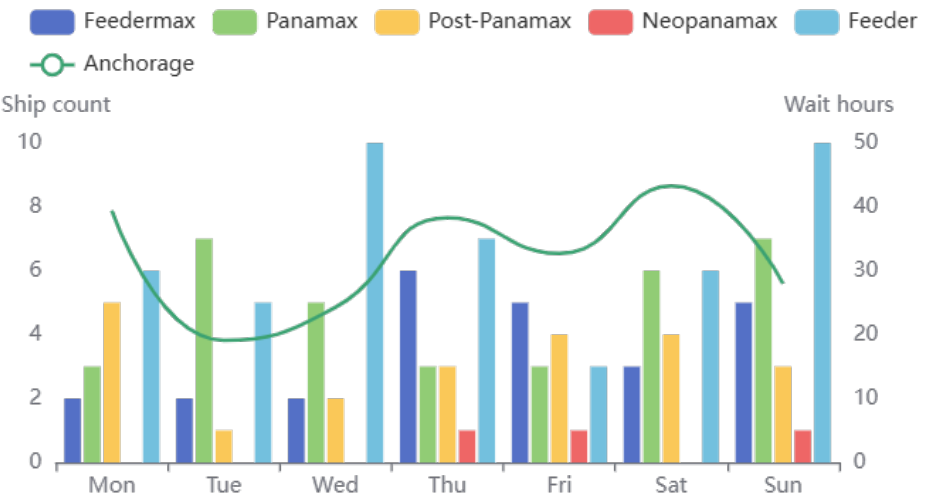
Type	M	T	W	Th	F	Sat	Sun
F.ma.	0	0	0	0	2	0	0
Pan.	1	0	2	1	0	0	0
PPx	0	0	0	0	0	0	0
NPx	0	1	0	1	0	1	0
Fd	0	0	0	1	0	3	0
WT.h.	3.6	0.8	5.9	2.1	8.3	8.1	0.0
Ulcw	0	0	0	0	0	1	0



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

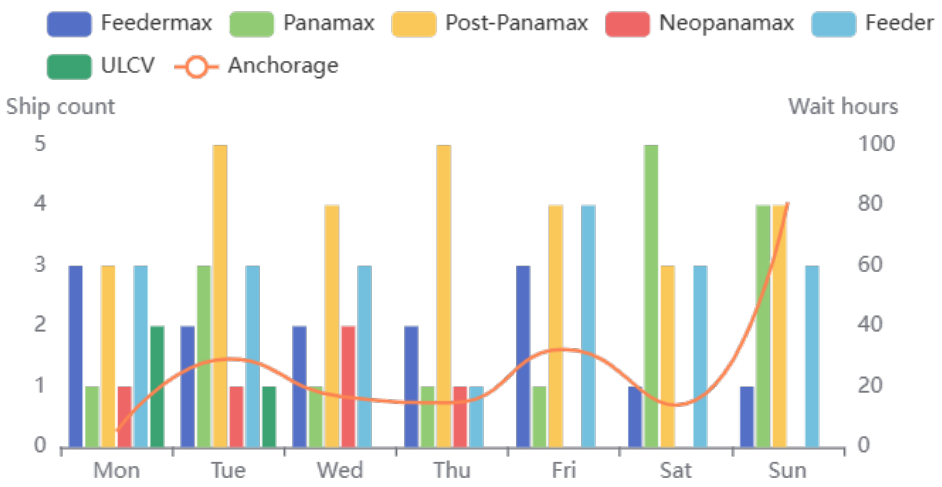
Type	M	T	W	Th	F	Sat	Sun
F.ma.	2	2	2	6	5	3	5
Pan.	3	7	5	3	3	6	7
PPx	5	1	2	3	4	4	3
NPx	0	0	0	1	1	0	1
Fd	6	5	10	7	3	6	10
Ulcw	0	0	0	0	0	0	0
WT.h.	39.4	19.1	24.3	38.3	32.7	43.3	28



最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

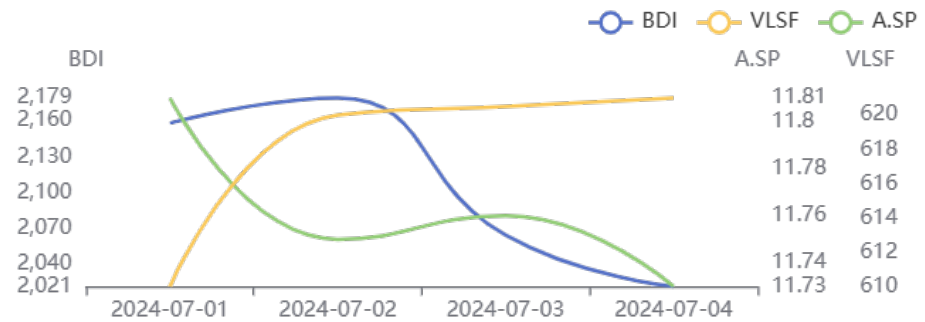
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

Type	M	T	W	Th	F	Sat	Sun
F.ma.	3	2	2	2	3	1	1
Pan.	1	3	1	1	1	5	4
PPx	3	5	4	5	4	3	4
NPx	1	1	2	1	0	0	0
Fd	3	3	3	1	4	3	3
Ulcw	2	1	0	0	0	0	0
WT.h.	5.2	29.2	16.8	14.7	32.4	13.9	81



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

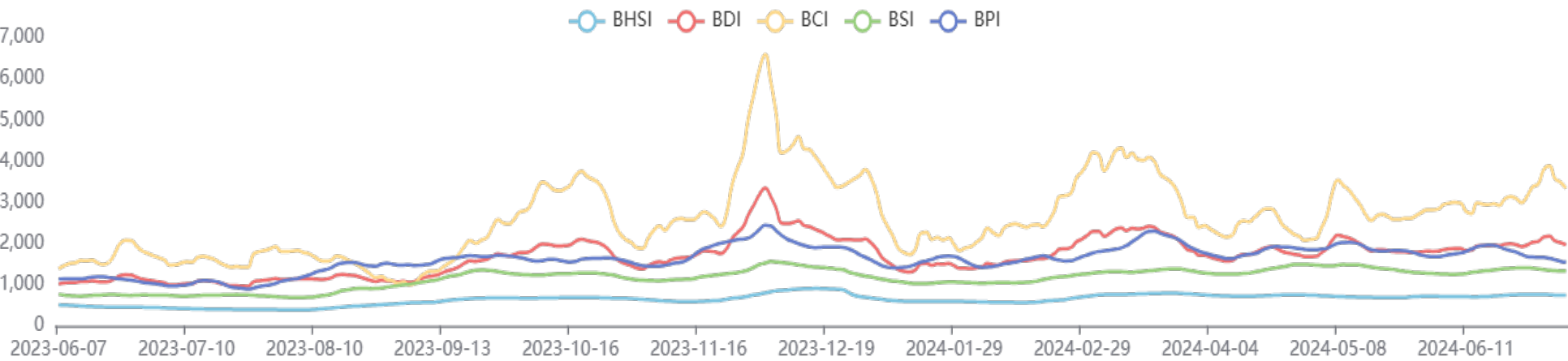
Type	M	T	W	Th	F	Sat	Sun
BDI	1662	1640	1607	1568	1546		
VLSF	610.00	620.00	620.50	621.00			
A.SP	11.81	11.75	11.76	11.73	11.75	11.6	



第三部分 航运市场 SHIPPING MARKET

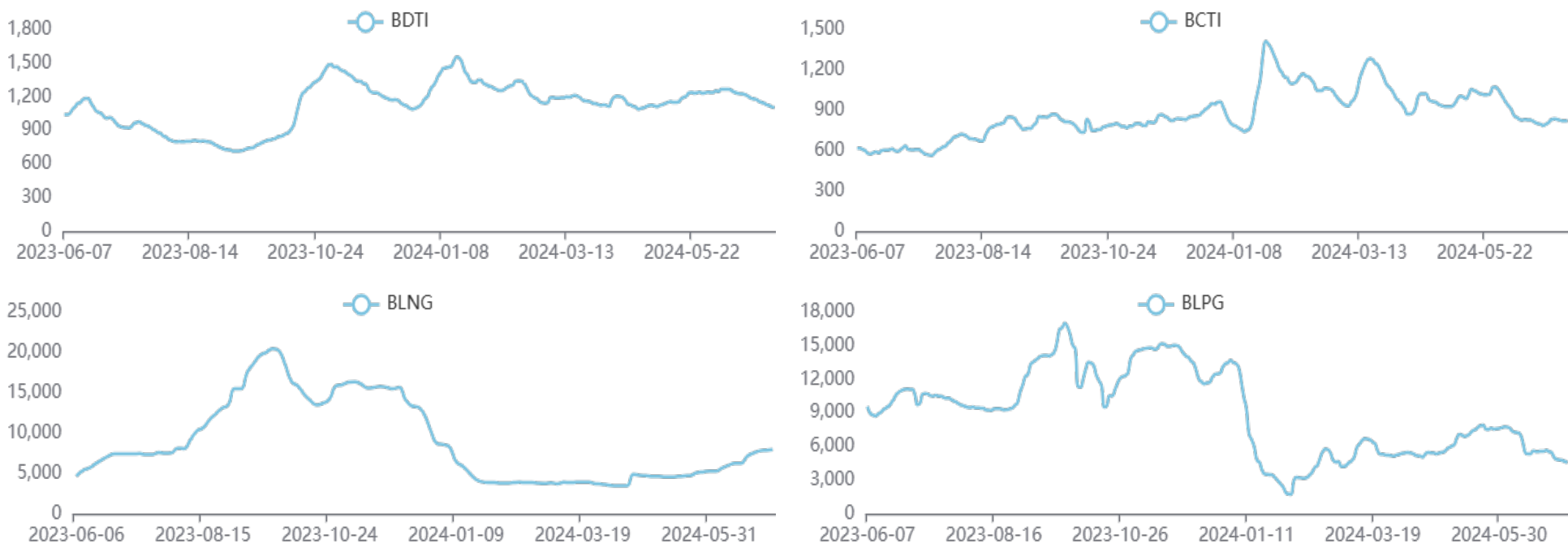
波罗的海干散货指数Baltic Dry Index

Type	PI	WoW	W%	M%	y%
BDI	1966	-84.0	-4.1	4.52	97.79
BCI	3339	-104.0	-3.02	11.37	126.37
BPI	1546	-121.0	-7.26	-11.66	59.55
BSI	1335	-50.0	-3.61	6.46	81.14
BHSI	742	-21.0	-2.75	3.92	72.56



能源运价指数Energy Shipping Index

Type	PI	WoW	W%	M%	y%
BDTI	1102	-48.0	-4.17	-13.02	13.14
BCTI	822	-12.0	-1.44	-4.2	34.98
BLNG	7954	151.0	1.94	40.38	7.14
BLPG	4574	-436.0	-8.7	-37.04	-52.93



第四部分 运力分布 SUPPLY DISTRIBUTION

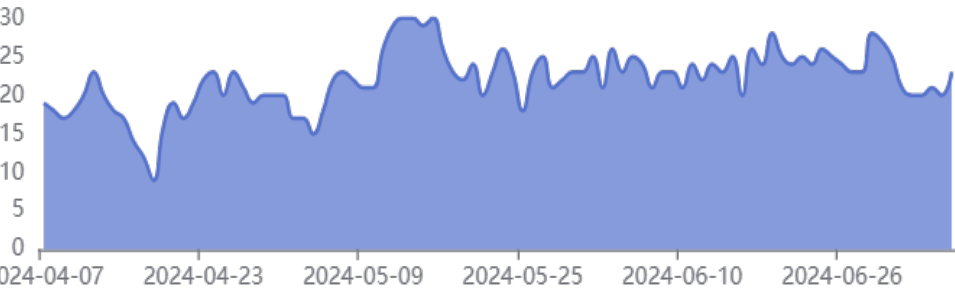


好望角型散货船 Capesize

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.

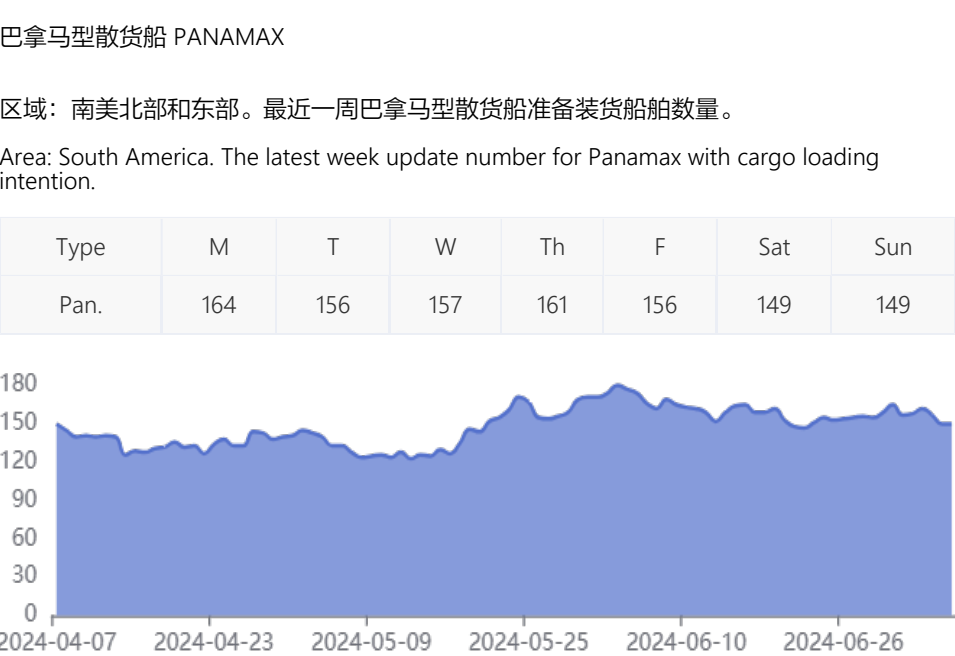
Type	M	T	W	Th	F	Sat	Sun
Cape	25	21	20	20	21	20	23



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.

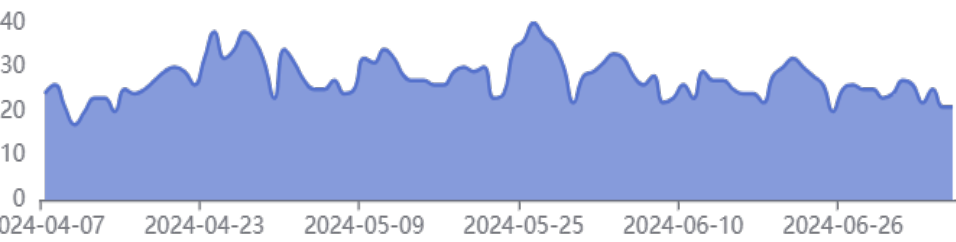
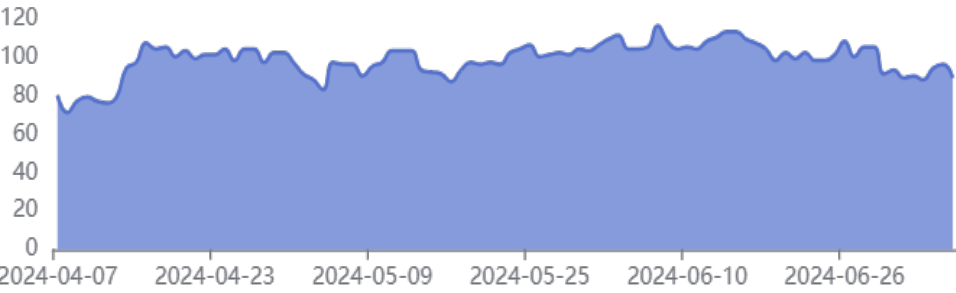
Type	M	T	W	Th	F	Sat	Sun
Cape	24	27	26	22	25	21	21



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	93	89	90	88	94	96	89

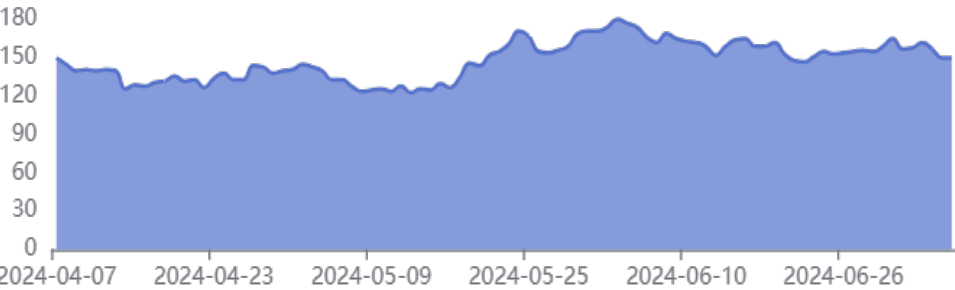


巴拿马型散货船 PANAMAX

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.

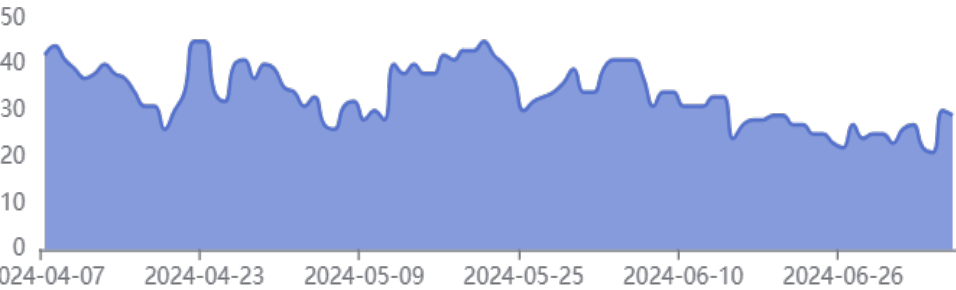
Type	M	T	W	Th	F	Sat	Sun
Pan.	164	156	157	161	156	149	149



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.

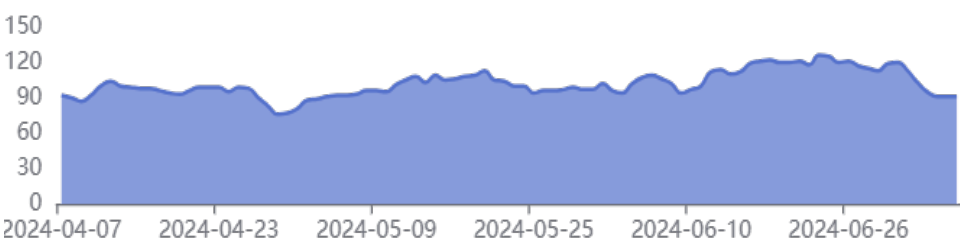
Type	M	T	W	Th	F	Sat	Sun
Pan.	22	19	21	20	19	19	16



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.	120	113	103	95	91	91	91

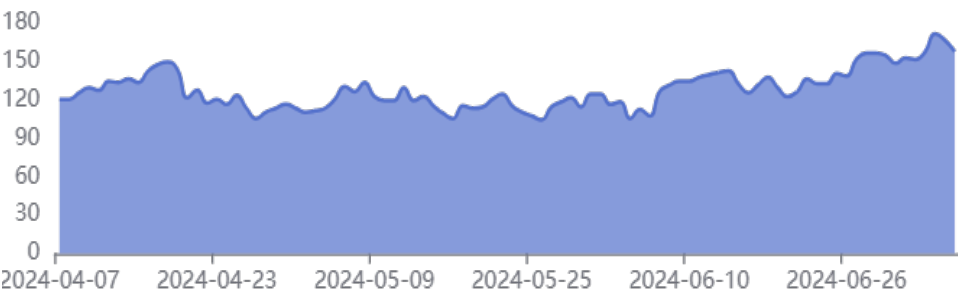


超大灵便型散货 SUPRAMAX

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.

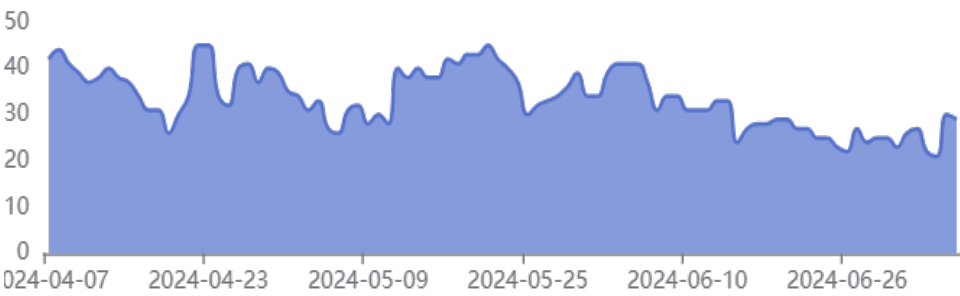
Type	M	T	W	Th	F	Sat	Sun
SMX	148	152	151	157	171	166	157



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.

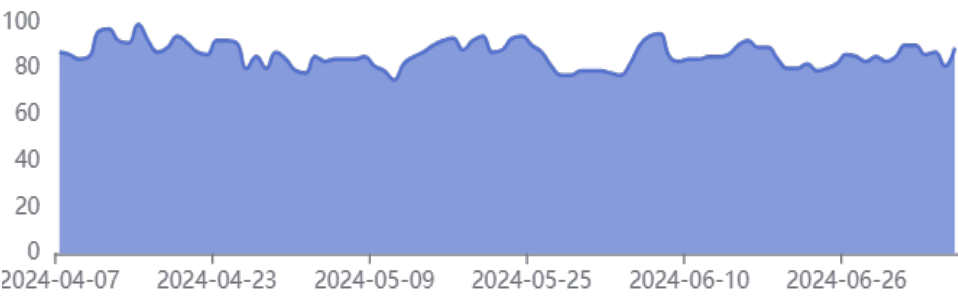
Type	M	T	W	Th	F	Sat	Sun
SMX	23	26	27	22	21	30	29



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.

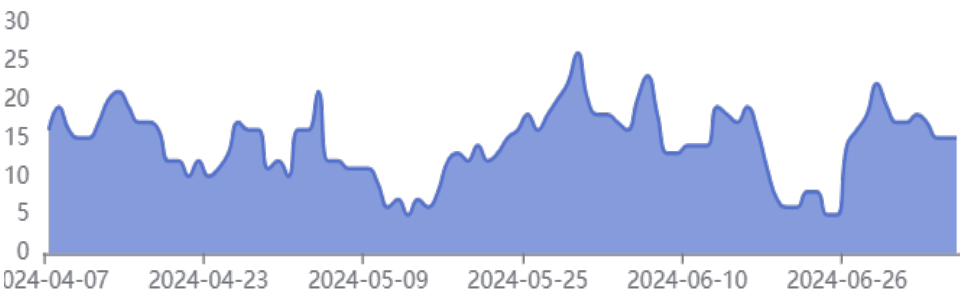
Type	M	T	W	Th	F	Sat	Sun
SMX	17	17	18	17	15	15	15



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.

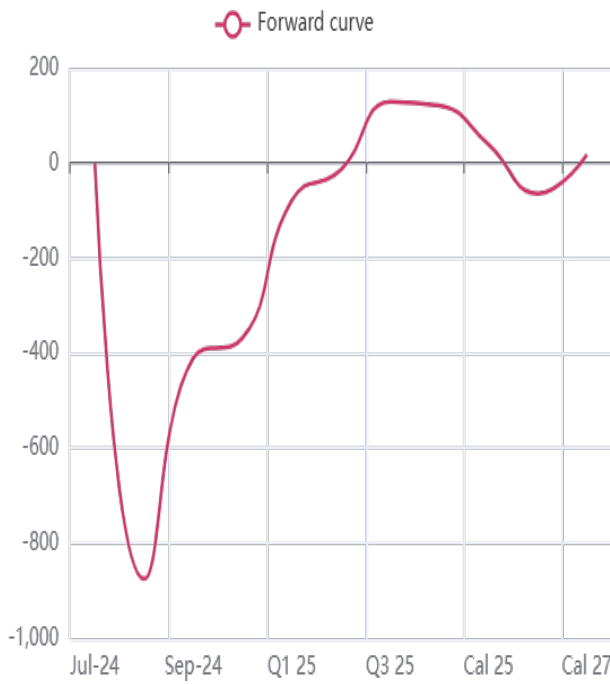
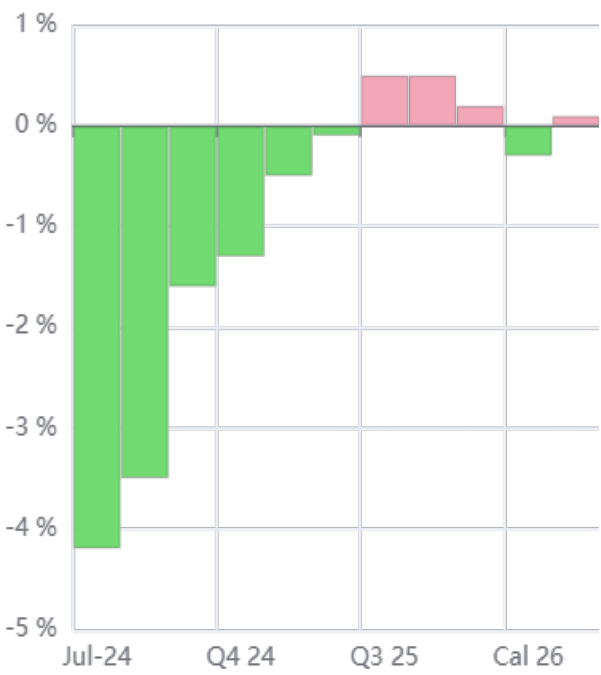
Type	M	T	W	Th	F	Sat	Sun
SMX	85	90	90	86	87	81	89



第五部分 远期运价协议 FFA

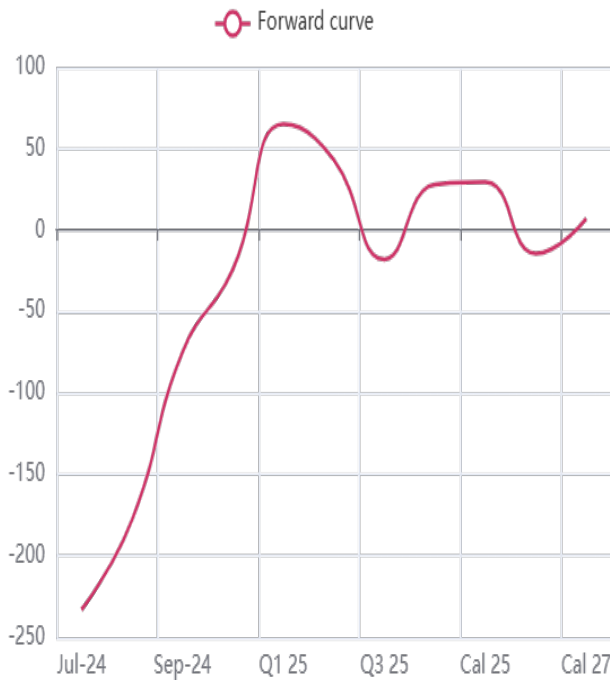
好望角型散货船Capesize

5TC	\$/day	WoW	
Jul-24	26,218.00	-1153.0	-4.2 %
Aug-24	24,257.00	-875.0	-3.5 %
Sep-24	25,754.00	-410.0	-1.6 %
Q4 24	27,077.33	-368.0	-1.3 %
Q1 25	15,746.00	-79.0	-0.5 %
Q2 25	21,336.00	-14.0	-0.1 %
Q3 25	24,836.00	129.0	0.5 %
Q4 25	25,071.00	121.0	0.5 %
Cal 25	21,747.25	39.25	0.2 %
Cal 26	20,729.25	-63.75	-0.3 %
Cal 27	19,961.00	18.0	0.1 %



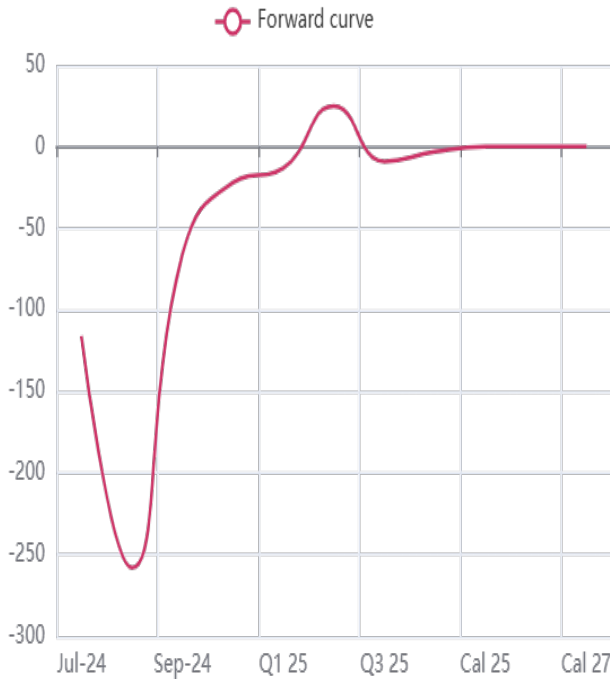
巴拿马型散货船Panamax

4TC	\$/day	WoW	
Jul-24	13,146.00	-233.0	-1.7 %
Aug-24	13,929.00	-178.0	-1.3 %
Sep-24	14,782.00	-75.0	-0.5 %
Q4 24	15,242.67	-24.0	-0.2 %
Q1 25	12,361.00	65.0	0.5 %
Q2 25	14,036.00	43.0	0.3 %
Q3 25	13,811.00	-18.0	-0.1 %
Q4 25	13,457.00	28.0	0.2 %
Cal 25	13,416.25	29.5	0.2 %
Cal 26	12,510.75	-14.5	-0.1 %
Cal 27	12,325.00	7.0	0.1 %



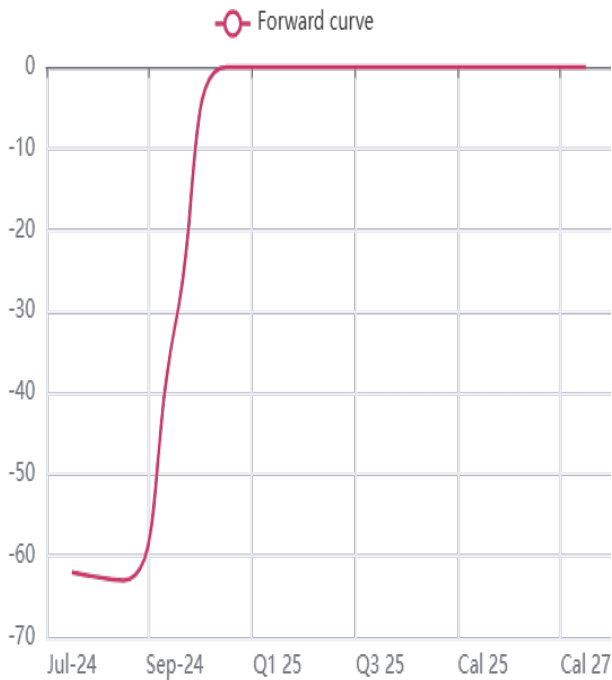
超大灵便型散货船Supramax

10TC	\$/day	WoW	
Jul-24	14,392.00	-116.0	-0.8 %
Aug-24	14,567.00	-258.0	-1.7 %
Sep-24	14,917.00	-66.0	-0.4 %
Q4 24	14,907.00	-22.0	-0.1 %
Q1 25	11,858.00	-13.0	-0.1 %
Q2 25	13,408.00	25.0	0.2 %
Q3 25	13,108.00	-9.0	-0.1 %
Q4 25	13,194.00	-3.0	0.0 %
12,892.00	Cal 25	0.0	0.0 %
Cal 26	12,396.00	0.0	0.0 %
Cal 27	12,213.00	0.0	0.0 %



灵便型散货船Handysize

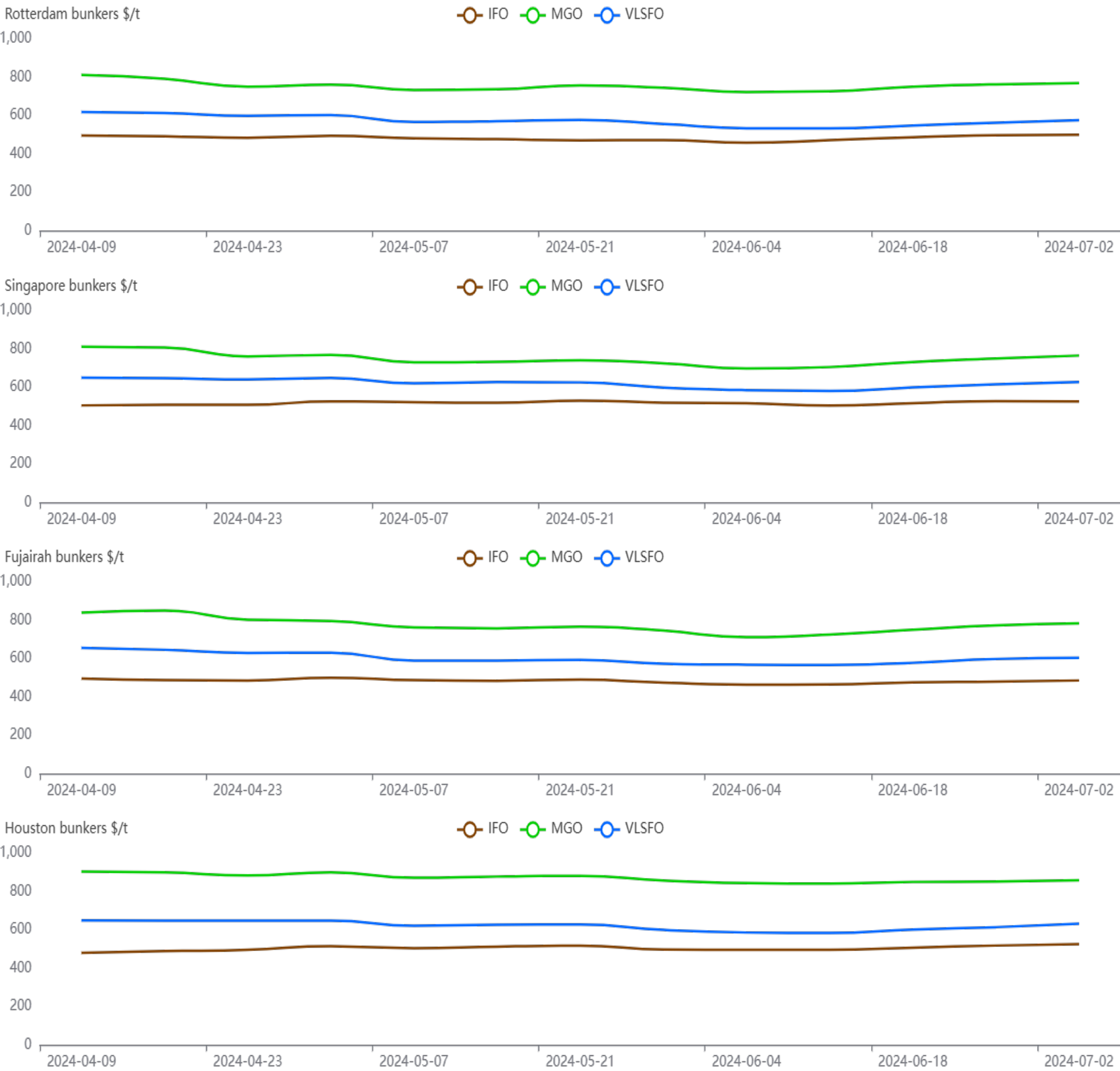
7TC	\$/day	WoW	
Jul-24	13,563.00	-62.0	-0.5 %
Aug-24	13,725.00	-63.0	-0.5 %
Sep-24	13,881.00	-32.0	-0.2 %
Q4 24	13,942.00	0.0	0.0 %
Q1 25	11,050.00	0.0	0.0 %
Q2 25	12,438.00	0.0	0.0 %
Q3 25	12,263.00	0.0	0.0
Q4 25	12,773.00	0.0	0.0 %
Cal 25	12,131.00	0.0	0.0 %
Cal 26	11,700.00	0.0	0.0 %
Cal 27	11,513.00	0.0	0.0 %



第六部分 燃油价格 BUNKER PRICE

MP	LO	HO	MO	SP	WoW	W%	M%
zhoushan	628.0	556.0	801.0	72.0	14.5	25.22	58.24
Singapore	628.5	526.5	766.0	102.0	14.5	16.57	48.91
Rotterdam	575.5	500.5	769.0	75.0	10.0	15.38	-0.66
Fujairah	603.5	486.0	784.5	117.5	-1.0	-0.84	12.98
Houston	631.5	525.5	858.5	106.0	10.0	10.42	18.44

(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	204.0		1.0	0.49	-8.52	-17.95
Maize	191.0		-10.0	-4.98	-9.05	-24.1
Soybeans	224.0		-4.0	-1.75	-3.45	-18.94
Rice	251.0		-3.0	-1.18	-2.71	21.19
Barley	214.0		2.0	0.94	-6.14	-6.48
Energy	Index		+/-	Weekly	Monthly	YTD
Crude Oil	USD/Bbl	82.1	0.51	0.63	6.37	18.76
Brent	USD/Bbl	85.61	-0.41	-0.48	5.29	15.78
Natural Gas	USD/MMBtu	2.58	-0.24	-8.51	0.0	-6.18
Gasoline	USD/Gal	2.53	0.02	0.8	4.55	0.0
Heating Oil	USD/Gal	2.56	0.04	1.59	7.11	5.35
Ethanol	USD/Gal	1.86	-0.1	-5.1	2.2	-27.06
Naphtha	USD/T	662.93	0.95	0.14	0.13	19.98
Propane	USD/Gal	0.76	0.01	1.33	8.57	31.03
Uranium	USD/Lbs	85.75	2.15	2.57	-3.22	51.77
Methanol	CNY/T	2522.0	39.0	1.57	-4.29	22.73
TTF Gas	EUR/MWh	34.85	-0.07	-0.2	0.61	1.01
UK Gas	GBP/thm	82.62	1.08	1.32	-0.4	-3.03
Industrial	Index		+/-	Weekly	Monthly	YTD
Copper	USD/Lbs	4.4	-0.03	-0.68	-4.35	15.79
Coal	USD/T	133.2	1.3	0.99	-7.44	6.14
Steel	CNY/T	3350.0	-15.0	-0.45	-4.8	-8.54
Iron Ore	USD/T	106.51	-0.04	-0.04	-9.37	-6.98
Aluminum	USD/T	2537.5	26.5	1.06	-4.34	16.61
Lithium	CNY/T	91500.0	-2000.0	-2.14	-13.27	N/A
Metals	Index		+/-	Weekly	Monthly	YTD
Gold	USD/t.oz	2324.9	1.5	0.06	-0.09	20.33
Silver	USD/t.oz	29.2	-0.3	-1.02	-3.95	28.18
Platium	USD/t.oz	993.0	-10.5	-1.05	-4.91	6.49
Currencies	Index		+/-	Weekly	Monthly	YTD
EUR/USD	1.08		0.01	0.93	0.0	-0.92
USD/CNY	7.3		0.01	0.14	0.55	0.83

第八部分 本周话题 WEEKLY TOPIC



北极北方航道航线概述

近几年因为北极北方航道的冰情在夏季逐步消融，从波罗的海到远东的航行距离可减少近30%的里程，加上节省了运河通行费，绕过红海动荡海域，可见到北方航道商船通行在逐渐增多。HiFleet一直在关注该航道船舶的通行情况。

2013年俄罗斯联邦政府出台的《北方海航道航行规则》列明了北方航道（Northern Sea Route 简称NSR）的地理区域，该航道从白令海峡北端开始，经楚科奇海、德朗海峡、东西伯利亚海，经新西伯利亚群岛、北地群岛、喀拉海到新地岛北端。

根据不同船舶通过北方航道轨迹情况，业内将这些船舶航线分为沿岸航线，中间航线，高维航线和穿过北极点航线。绝大多数商船采用中间航线，如果从东界驶入，该航线从白令海峡驶入楚科奇海，过弗兰格尔岛南侧的德朗海峡后进入东西伯利亚海，沿西伯利亚群岛北侧途径拉普捷夫海后穿过维利基斯基海峡，继续向西南在迪克森港北侧再向西北沿新地岛抵达巴伦支海。在冰情缓解的夏季，部分船舶会绕过德朗海峡、拉普捷夫海峡。

北方航道船舶的通行由俄罗斯联邦政府机构北方航道管理局（Northern Sea Route Administration, ANSR）组织实施。摩尔曼斯克、符拉迪沃斯托克（海参崴）、阿尔汉格尔斯克设有ANSR的办事处。

船舶从西部（欧洲方向）驶近北方航道时，在接近33°E（称西界）前72h；船舶从东部（白令海峡或美国、加拿大方向）驶近北方航道时，在接近62°N和或169°W（称东界）前72h需向相关主管机关报告船舶驶入计划和驶入后的日常报告。在船舶距离东界或西界前24小时应再次向北方航道管理局报告预计到达相应界线时间。船舶驶近俄罗斯北方航道东界或西界时，应向管理局报告预计到达北方海水域的时间、位置、计划航线和航速。驶入或驶离后应向管理局报告当时实际船舶的时间、位置、航向和航速。

在北方航道航行的外国船舶，若船长无冰区航行经验，则应实施强制引航；若船长有3个月以上的冰区航行经验，则可自引船舶通过北方航道，但是如果船舶位于北方航道桑尼克夫海峡（Sannikov Strait）和德米特里·拉普捷夫海峡（Dmitry Laptev Strait），维利基茨基海峡（Vilkitsky Strait）和肖克斯凯海峡（Shokalsky Strait）强制引航水域内，则不论船长是否有冰区航行经验，均需申请引航。

商船航行在北方航道的的时间集中在7月中旬至十月中旬，该航道海域属于极端敏感区域，意图通行北方航道的船舶一则要求船舶有相应的技术能力，二则船舶的航行计划也具有挑战。北方航道的开发利用可能为航运带来机会，但也存在重大的环境风险。

In recent years, due to the gradual melting of ice in the Arctic Northern Sea Route during the summer, and the sailing distance from the Baltic Sea to the Far East can be reduced by nearly 30%, along with savings on canal tolls and bypassing the turbulent waters of the Red Sea, it is evident that the number of commercial ships transiting the Northern Sea Route is gradually increasing. HiFleet has been monitoring the passage of ships in this route.

The "Regulations for Navigation on the Northern Sea Route" issued by the Russian Federation in 2013 delineate the geographical area of the Northern Sea Route (NSR), which starts from the northern end of the Bering Strait, passing through the Chukchi Sea, the De Long Strait, the East Siberian Sea, then through the New Siberian Islands, the Severnaya Zemlya Archipelago, Kara Sea, ending at the northern tip of Novaya Zemlya.

Based on the trajectories of different ships passing through the Northern Sea Route, the marine industry categorizes these ship routes into coastal, middle, high-latitude, and polar routes. The majority of ships follow the middle route, which enters from the Bering Strait into the Chukchi Sea, crosses the De Long Strait south of the Wrangel Island, enters the East Siberian Sea, passes north of the Siberian Islands through the Vilkitsky Strait, continues southwest of the Dmitry Laptev Strait, and then northwest along the Novaya Zemlya to reach the Barents Sea. During the summer when ice conditions ease, some ships may bypass the De Long Strait and Dmitry Laptev Strait.

The passage of ships on the Northern Sea Route is organized and implemented by the Northern Sea Route Administration (NSRA), a government agency of the Russian Federation. NSRA offices are located in Murmansk, Vladivostok, and Arkhangelsk.

Foreign ships navigating the Northern Sea Route, if the captain lacks experience in ice-covered areas, must be subject to mandatory pilotage. If the captain has over three months of ice navigation experience, they can self-navigate the ship through the Northern Sea Route. However, in mandatory pilotage areas such as the Sannikov Strait, Dmitry Laptev Strait, Vilkitsky Strait, and Shokalsky Strait, regardless of the captain's experience, pilotage is required.

Commercial shipping in the Northern Sea Route is concentrated from mid-July to mid-October. This area is extremely sensitive, and ships intending to transit the Northern Sea Route need to have the appropriate technical capabilities, as well as face challenging navigation plans. While the development and utilization of the Northern Sea Route may bring opportunities for shipping, it also poses significant environmental risks.

刘红太