



2024年 第29周市场周报

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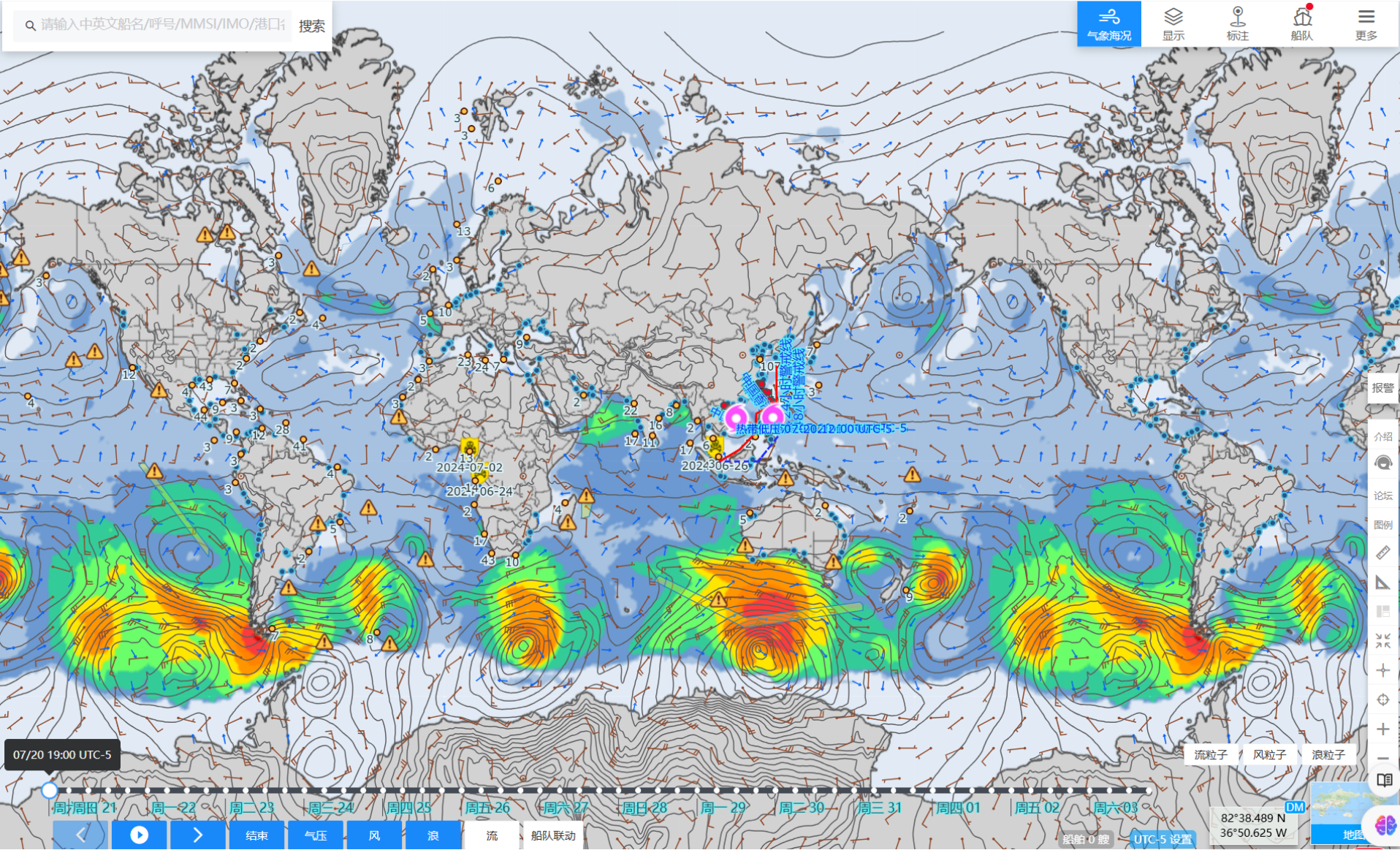
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最新商品价格 LATEST COMMODITIES PRICE

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874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 874 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.

海盗事件 Piracy

最近一周没有海盗事件报告。There is no piracy report for the latest week.

其它 Others

没有 Nil

航海气象 Meteorology

未来一周中国渤海海域风力维持4-5级，相关海域1米轻浪；黄海风力增强到6-7级，相关海域有时大浪；东海风力未来将经历9-10级，相关海域有时巨浪；台湾海峡风力未来将经历9-10级，台湾海峡海浪可能有4米巨浪；南海大部海域风力增强到5-6级，中浪。西北太平洋的热带风暴和台风开始频繁发展，第三号台风‘格美’可能于7月26日在宁波，温州，福建北部区域登陆。The coming week the wind in Bohai Sea stays moderate breeze with slight seas. Yellow Sea strengthens to near gale with rough sea sometimes. And China East Sea shall experience storm with high wave. The wind in the Taiwan Strait will experience storm and the sea there happens to experience high. In most of the South China Sea the wind stays strong breeze with moderate wave. There are low-pressures developing frequently in the North of the Pacific Ocean and one tropic storm ‘GAEMI’ is moving toward to China East Sea which might be landing on about 26th July.

海上事件 Marine Incidents

一艘7056载重吨的Prestige Falcon成品油轮（建于2007年）显示于7月15号凌晨在阿曼拉斯马德拉拉克东南25海里处倾覆。阿曼海事安全中心表示，船上16名船员失踪，7月16日正在进行搜救行动。A 7,056 DWT Prestige Falcon product tanker (built in 2007) is shown capsized in the early hours of July 15, 25 nautical miles southeast of Ras Madrahaq, Oman. The Mansea Safety Center said 16 crew members were missing and a search and rescue operation was underway on July 16.

备注 Remark

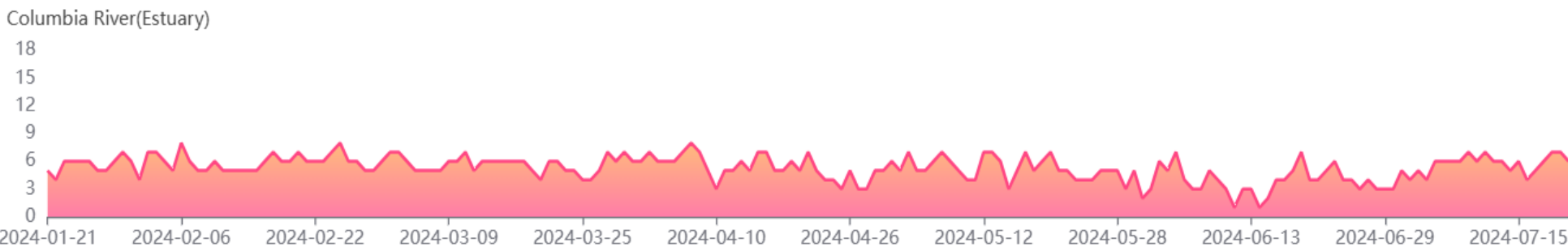
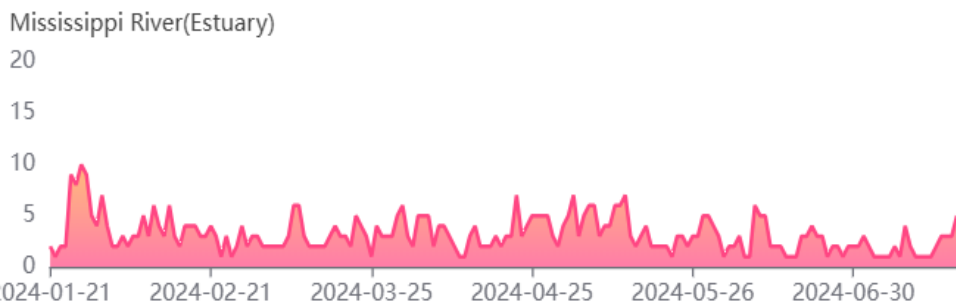
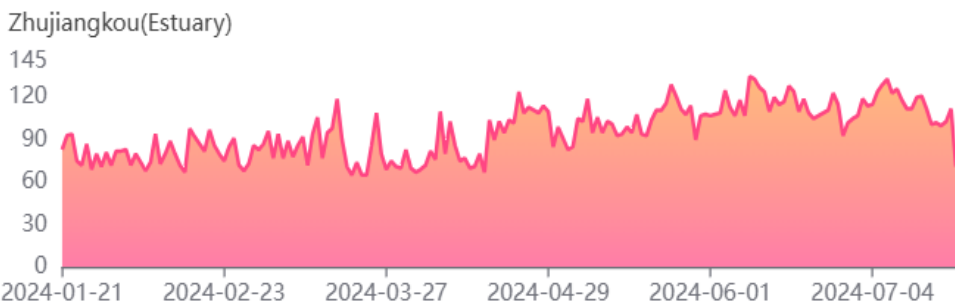
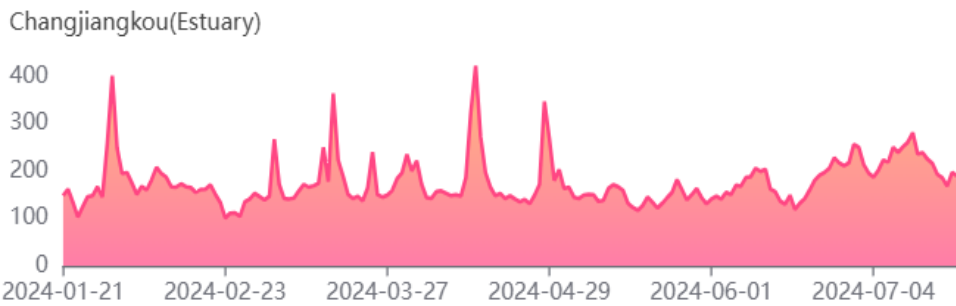
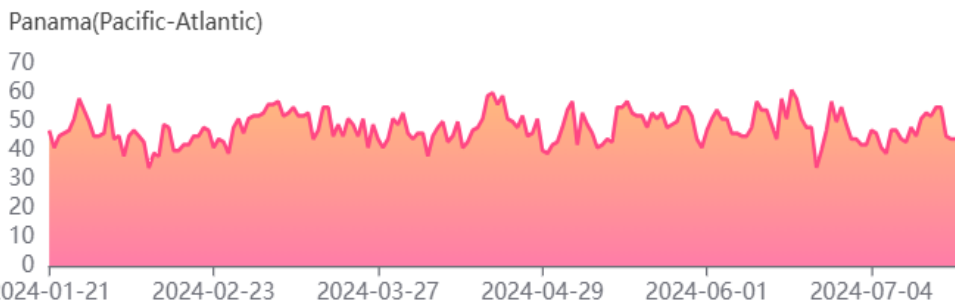
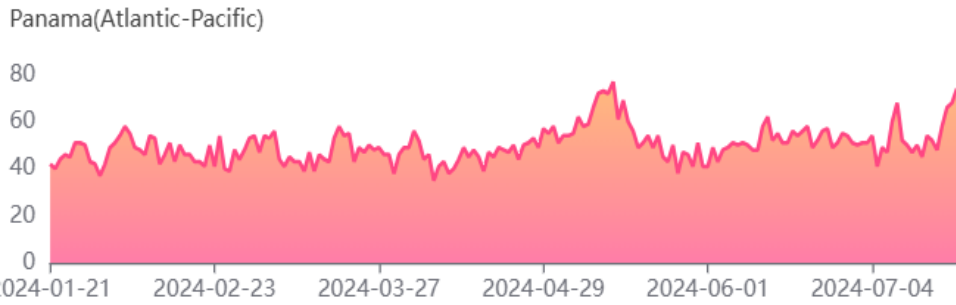
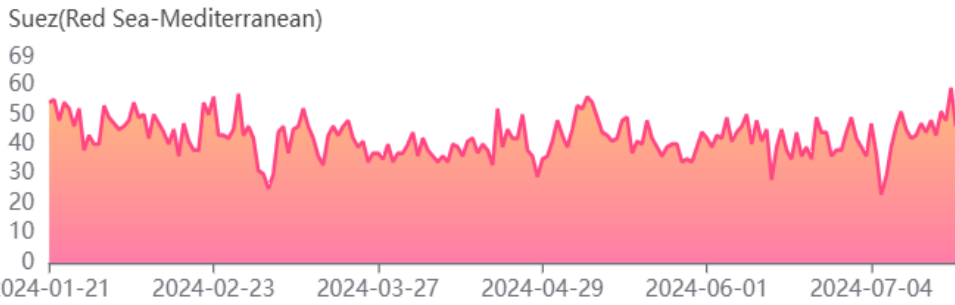
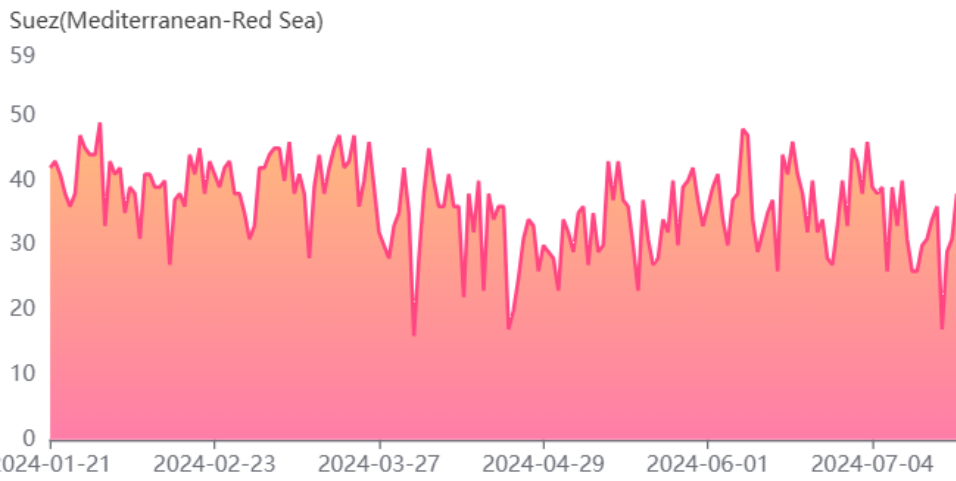
本报告数据截止时间为2024年7月21日北京时间17点；所有数据和或观点仅供参考，在任何情况下本公司及其员工不承担任何风险。The data deadline for this report is Beijing time 17 hours on Jul 21st of 2024; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

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	46	1247	44	63
Miss.Riv.	5	56	5	-15
CJK	190	6346	-362	1745
Pa.Atlan.	74	1560	46	114
Colum.Riv.	6	150	-3	33
Suez.Med.	38	982	-5	-96
Pa.Pac.	44	1350	35	-98
ZJK	71	3239	-143	-77

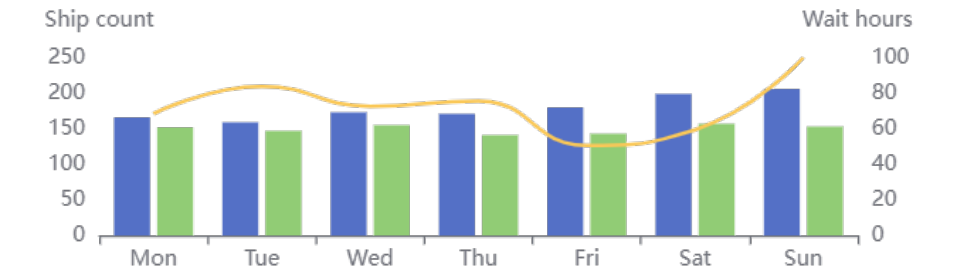
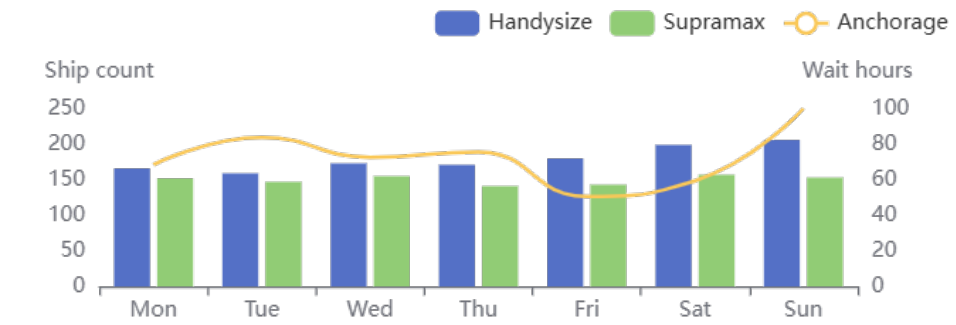


(P.N-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

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

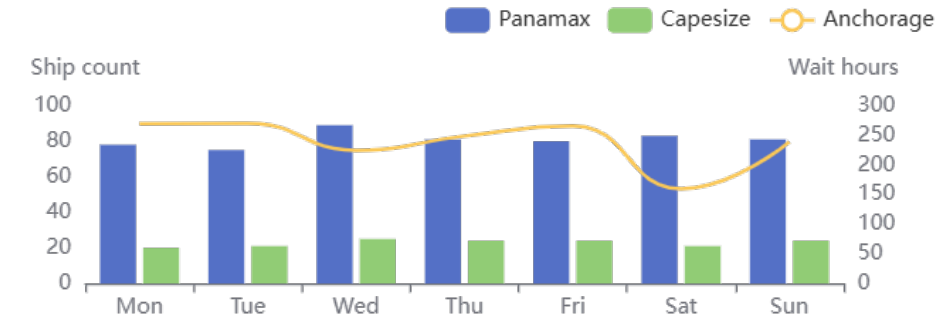
Type	M	T	W	Th	F	Sat	Sun
HDY	166	159	173	171	180	199	206
SMX	152	147	155	141	143	157	153
WT.h.	68.5	83.8	72.7	75.55	50.6	59.45	100



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

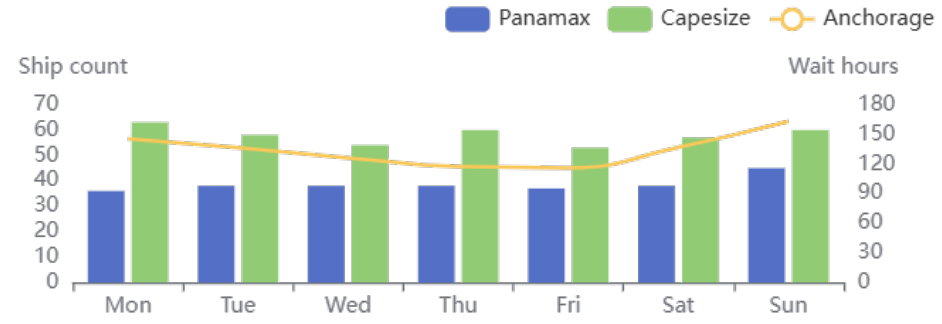
Type	M	T	W	Th	F	Sat	Sun
Pan.	78	75	89	81	80	83	81
Cap	20	21	25	24	24	21	24
WT.h.	269.2	270.1	224.7	248.7	265.8	159.8	239



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

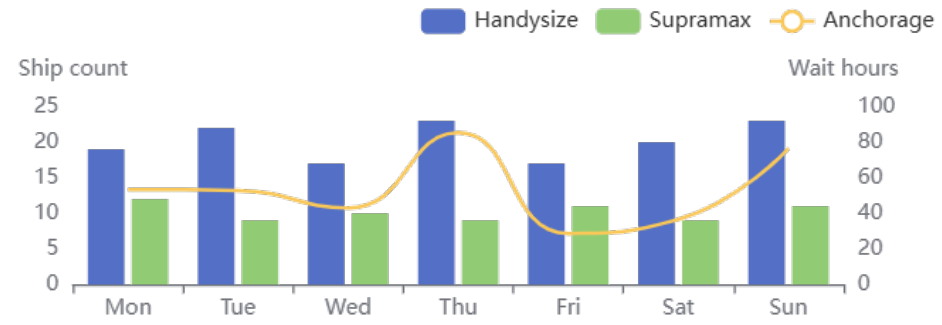
Type	M	T	W	Th	F	Sat	Sun
Pan.	36	38	38	38	37	38	45
Cap	63	58	54	60	53	57	60
WT.h.	145.4	136.4	126.1	117.4	116	136.8	163



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

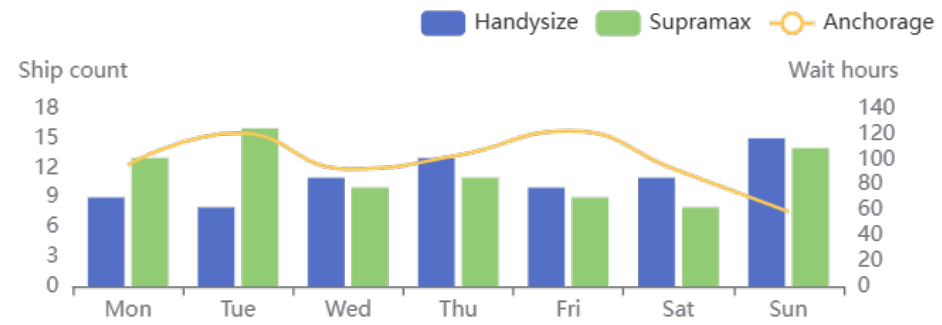
Type	M	T	W	Th	F	Sat	Sun
HDY	19	22	17	23	17	20	23
SMX	12	9	10	9	11	9	11
WT.h.	53.5	52.8	43	85.4	28.7	36.6	76.5



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

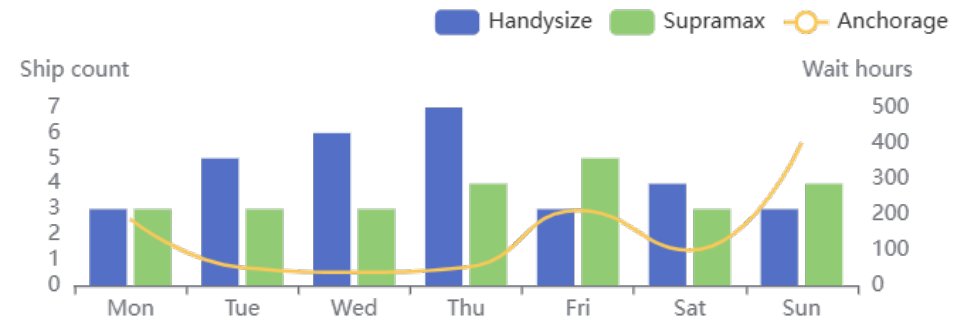
Type	M	T	W	Th	F	Sat	Sun
HDY	9	8	11	13	10	11	15
SMX	13	16	10	11	9	8	14
WT.h.	95.5	120.8	92.5	103.25	122.4	91.1	59



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

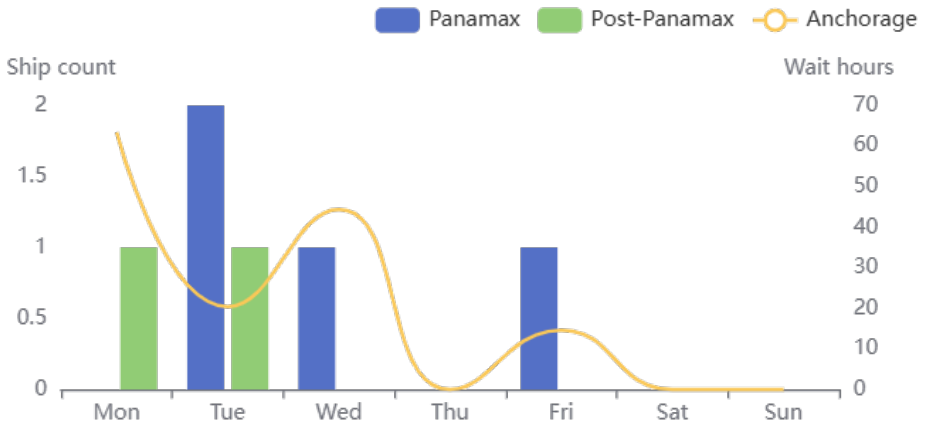
Type	M	T	W	Th	F	Sat	Sun
HDY	3	5	6	7	3	4	3
SMX	3	3	3	4	5	3	4
WT.h.	186.45	50.2	36.9	50.8	210.8	98.8	401



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

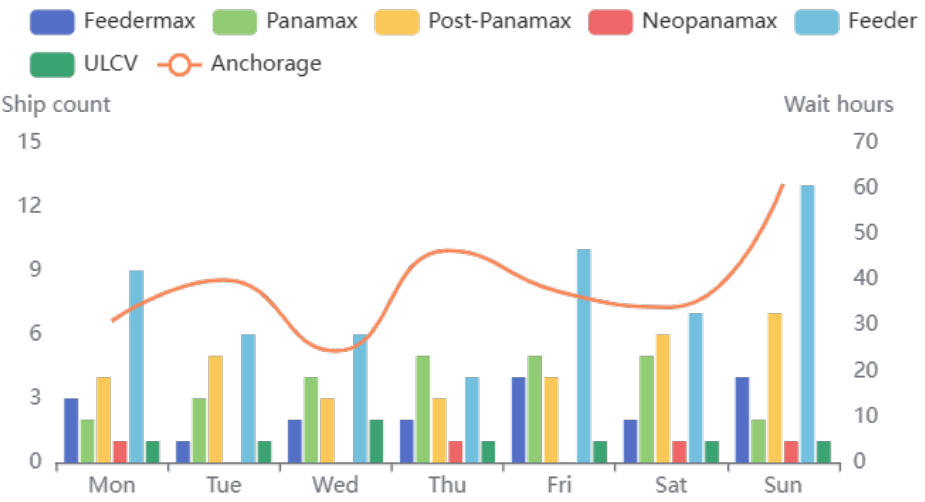
Type	M	T	W	Th	F	Sat	Sun
F.ma.	0	0	0	0	0	0	0
Pan.	0	2	1	0	1	0	0
PPx	1	1	0	0	0	0	0
NPx	0	0	0	0	0	0	0
Fd	0	0	0	0	0	0	0
WT.h.	63.4	20.4	44.4	0.0	14.6	0.0	0.0
Ulcw	0	0	0	0	0	0	0



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

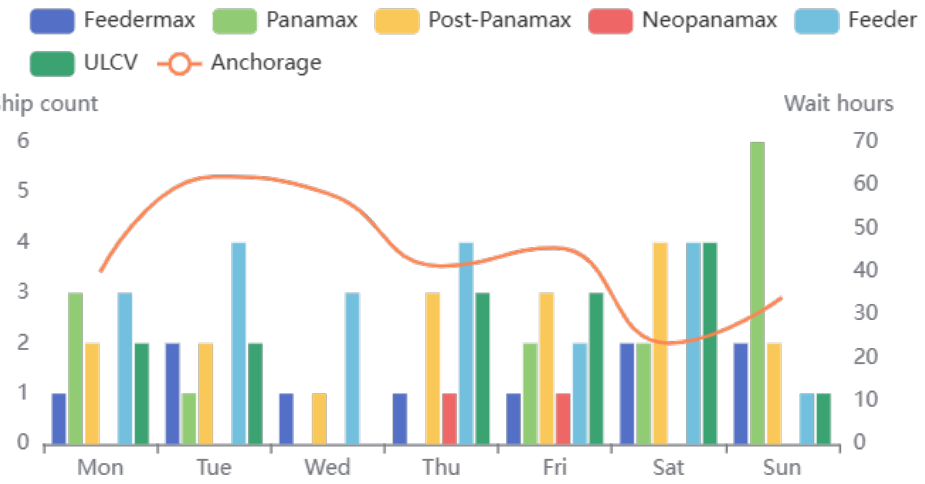
Type	M	T	W	Th	F	Sat	Sun
F.ma.	3	1	2	2	4	2	4
Pan.	2	3	4	5	5	5	2
PPx	4	5	3	3	4	6	7
NPx	1	0	0	1	0	1	1
Fd	9	6	6	4	10	7	13
Ulcw	1	1	2	1	1	1	1
WT.h.	31	40	24.4	46.4	37.4	34	61



最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

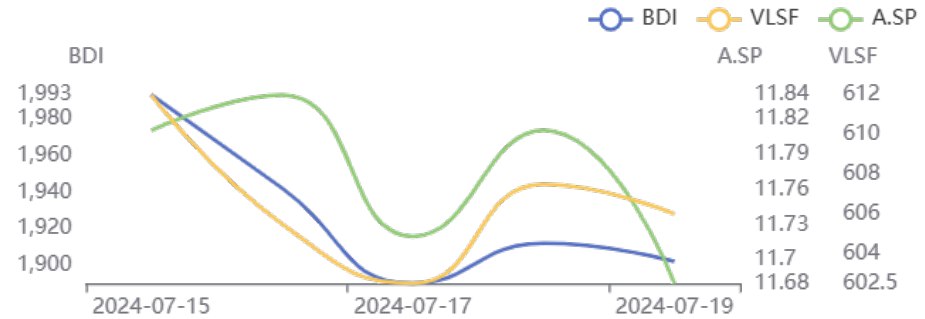
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

Type	M	T	W	Th	F	Sat	Sun
F.ma.	1	2	1	1	1	2	2
Pan.	3	1	0	0	2	2	6
PPx	2	2	1	3	3	4	2
NPx	0	0	0	1	1	0	0
Fd	3	4	3	4	2	4	1
Ulcw	2	2	0	3	3	4	1
WT.h.	39.9	62	58.1	41.3	45.5	23.4	34



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

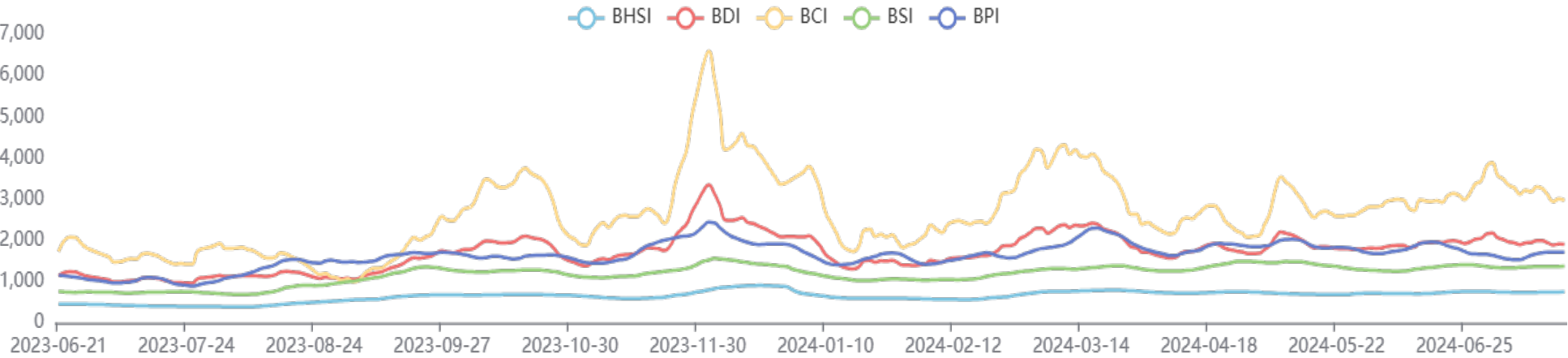
Type	M	T	W	Th	F	Sat	Sun
BDI	1702	1713	1713	1714	1714		
VLSF	612.00	605.50	602.50	607.50	606.00		
A.SP	11.81	11.84	11.72	11.81	11.68	11.67	



第三部分 航运市场 SHIPPING MARKET

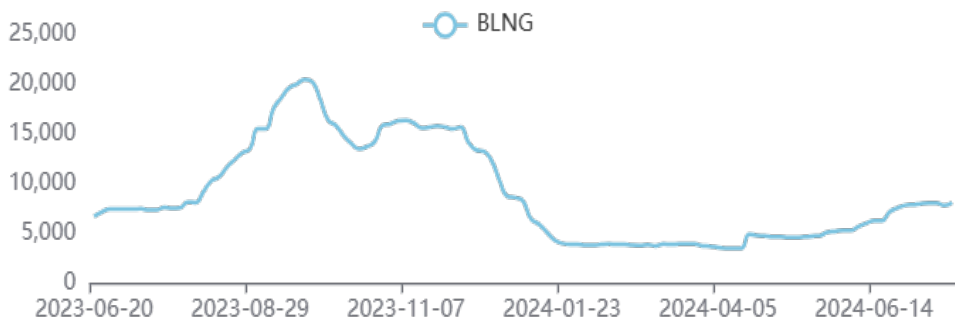
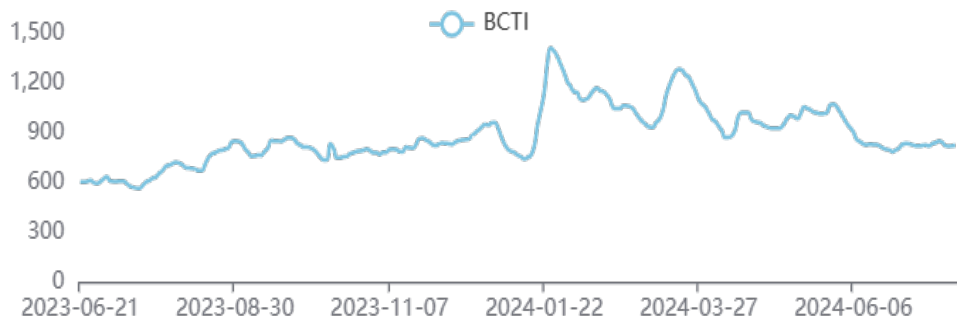
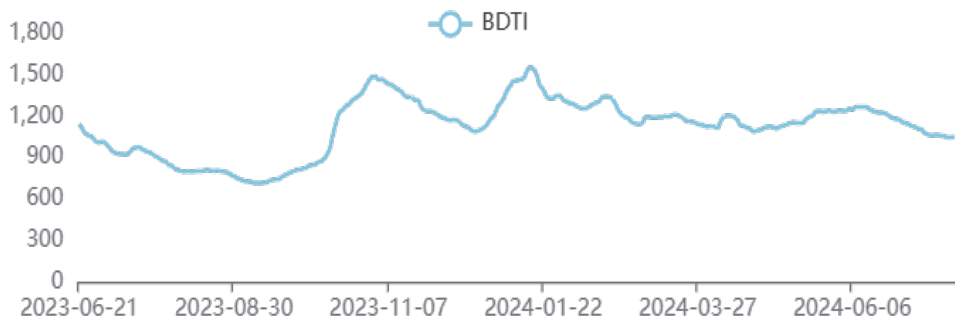
波罗的海干散货指数Baltic Dry Index

Type	PI	WoW	W%	M%	y%
BDI	1902	-95.0	-4.76	-4.76	89.44
BCI	2973	-323.0	-9.8	-5.38	102.52
BPI	1714	36.0	2.15	-6.19	72.61
BSI	1374	10.0	0.73	-1.72	82.23
BHSI	752	11.0	1.48	-0.13	86.14

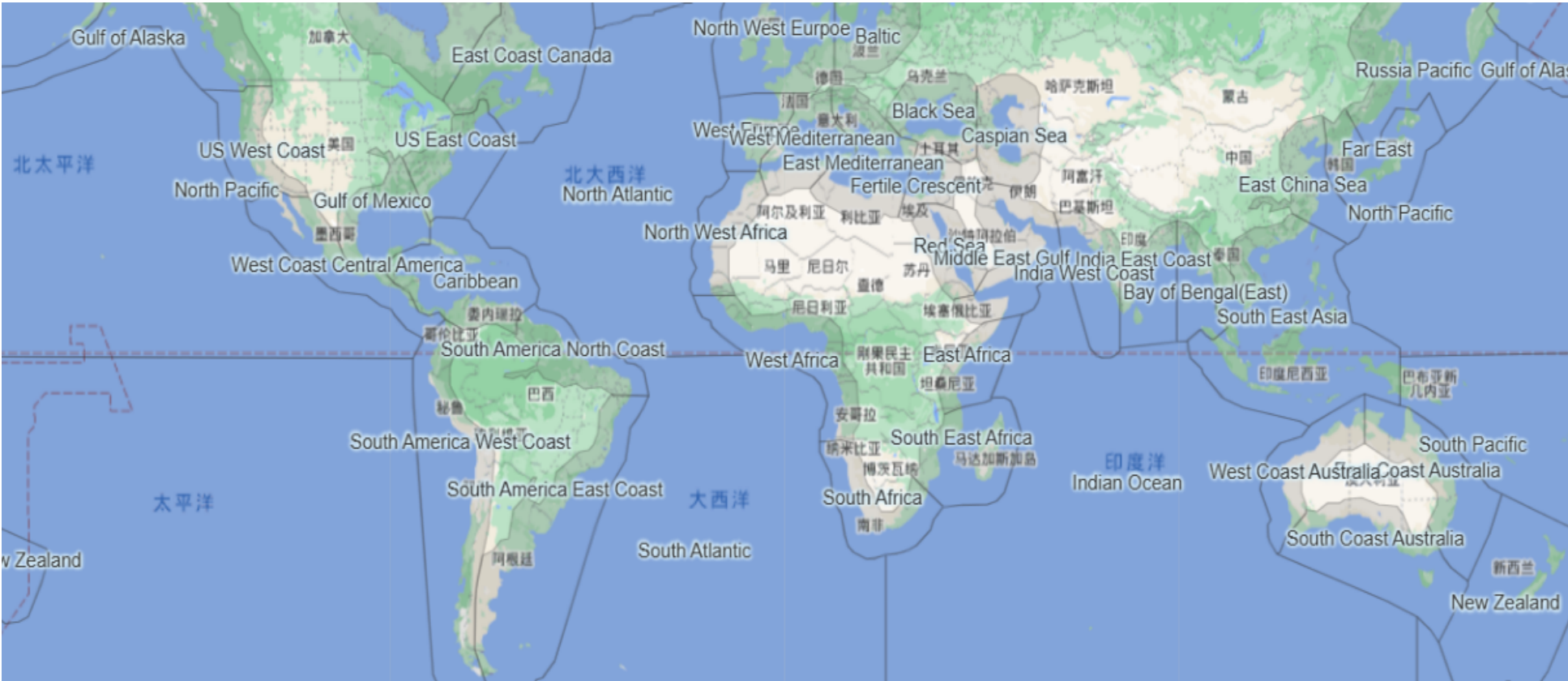


能源运价指数Energy Shipping Index

Type	PI	WoW	W%	M%	y%
BDTI	1056	-8.0	-0.75	-12.37	9.77
BCTI	822	-27.0	-3.18	3.4	41.24
BLNG	8067	37.0	0.46	13.24	6.48
BLPG	3420	-274.0	-7.42	-38.69	-67.02



第四部分 运力分布 SUPPLY DISTRIBUTION

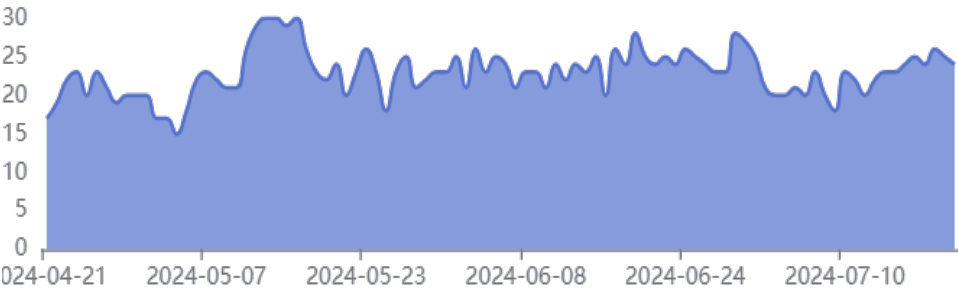


好望角型散货船 Capesize

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	23	24	25	24	26	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.

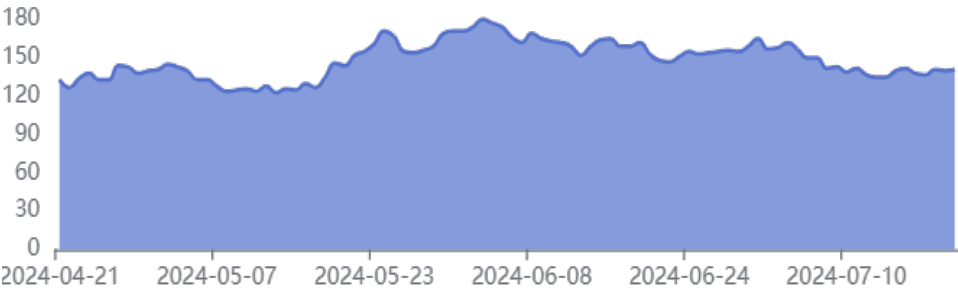
Type	M	T	W	Th	F	Sat	Sun
Cape	36	29	23	24	24	25	25

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.

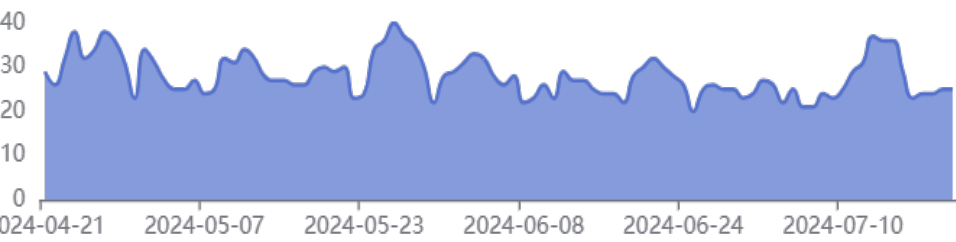
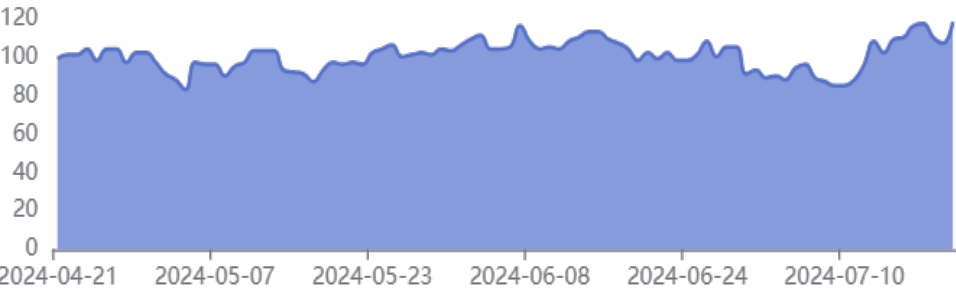
Type	M	T	W	Th	F	Sat	Sun
Pan.	139	141	137	136	140	139	140



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.

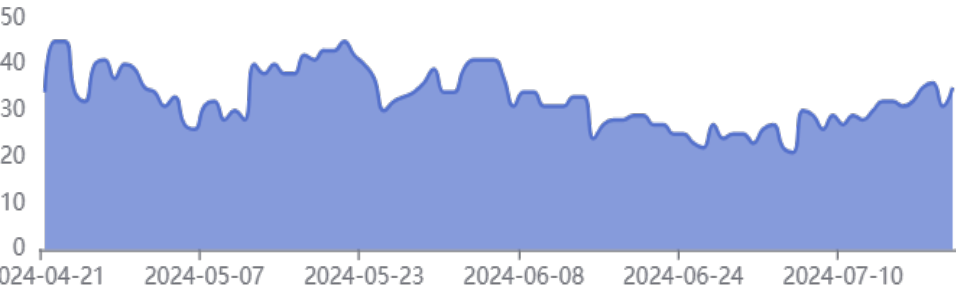
Type	M	T	W	Th	F	Sat	Sun
Cape	109	110	116	117	110	107	118



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.

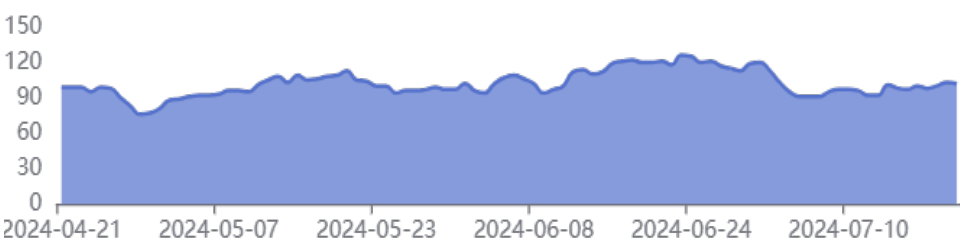
Type	M	T	W	Th	F	Sat	Sun
Pan.	21	17	22	19	24	21	17



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.	98	97	100	98	100	103	102

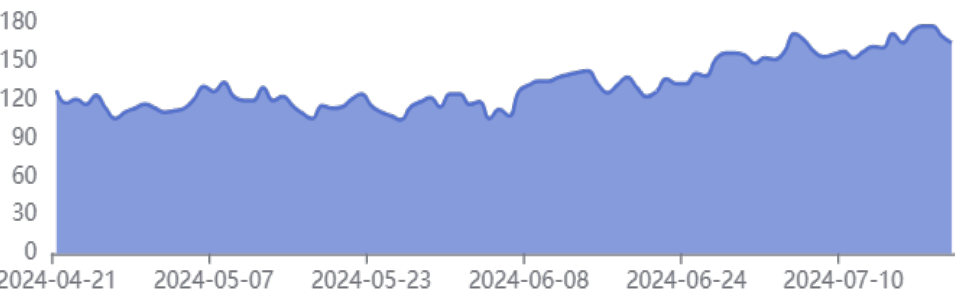


超大灵便型散货 SUPRAMAX

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.

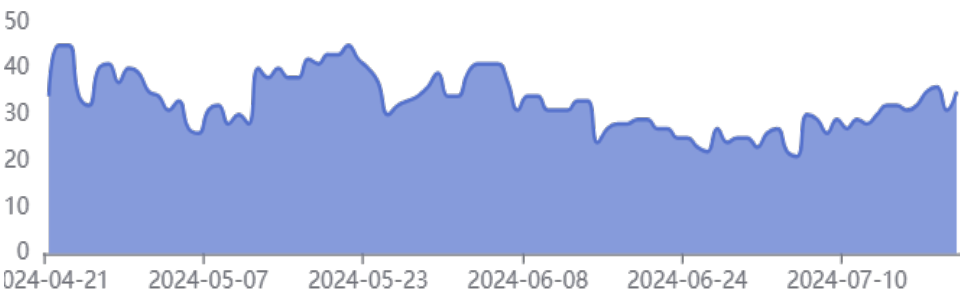
Type	M	T	W	Th	F	Sat	Sun
SMX	171	164	173	177	177	169	164



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.

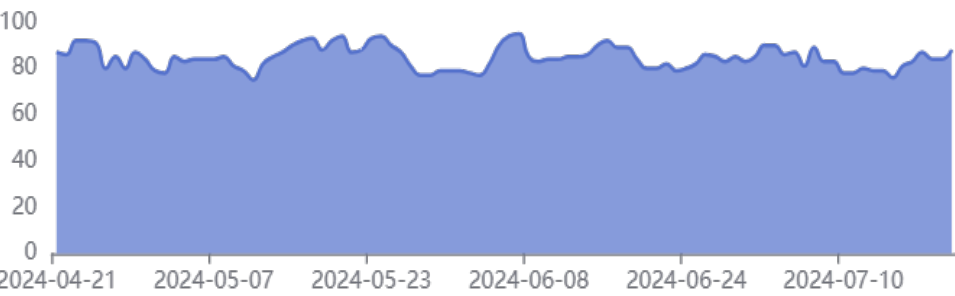
Type	M	T	W	Th	F	Sat	Sun
SMX	32	31	32	35	36	31	35



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.

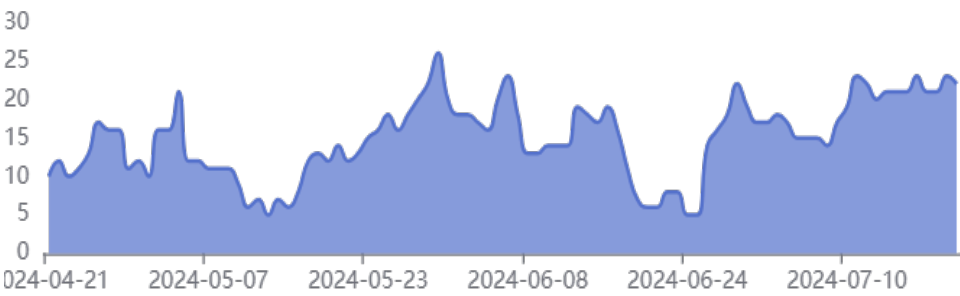
Type	M	T	W	Th	F	Sat	Sun
SMX	21	21	23	21	21	23	22



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.

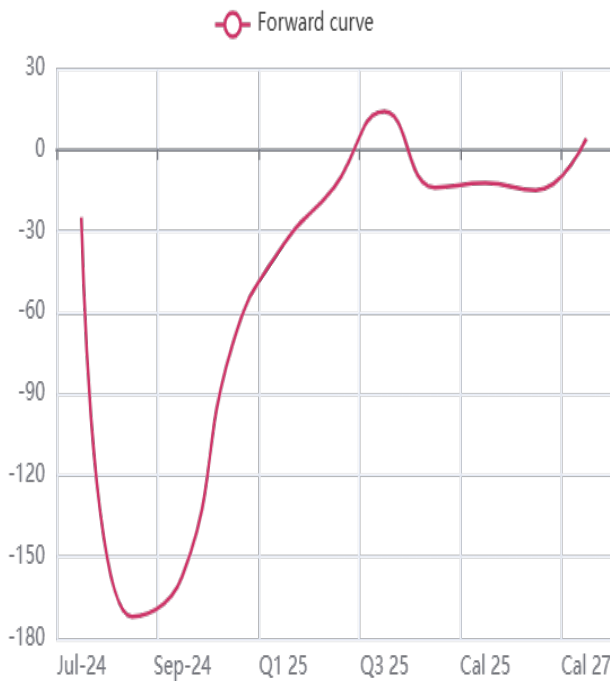
Type	M	T	W	Th	F	Sat	Sun
SMX	76	81	83	87	84	84	88



第五部分 远期运价协议 FFA

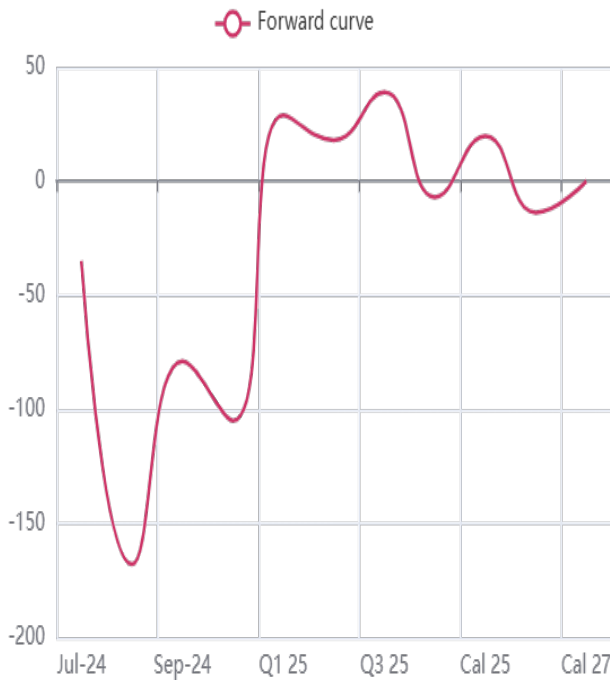
好望角型散货船Capesize

5TC	\$/day	WoW	
Jul-24	26,386.00	-25.0	-0.1 %
Aug-24	24,682.00	-172.0	-0.7 %
Sep-24	26,757.00	-157.0	-0.6 %
Q4 24	28,175.00	-71.33	-0.3 %
Q1 25	16,654.00	-35.0	-0.2 %
Q2 25	21,861.00	-14.0	-0.1 %
Q3 25	25,314.00	14.0	0.1 %
Q4 25	25,157.00	-14.0	-0.1 %
Cal 25	22,246.50	-12.25	-0.1 %
Cal 26	21,339.25	-15.0	-0.1 %
Cal 27	20,279.00	4.0	0.0 %



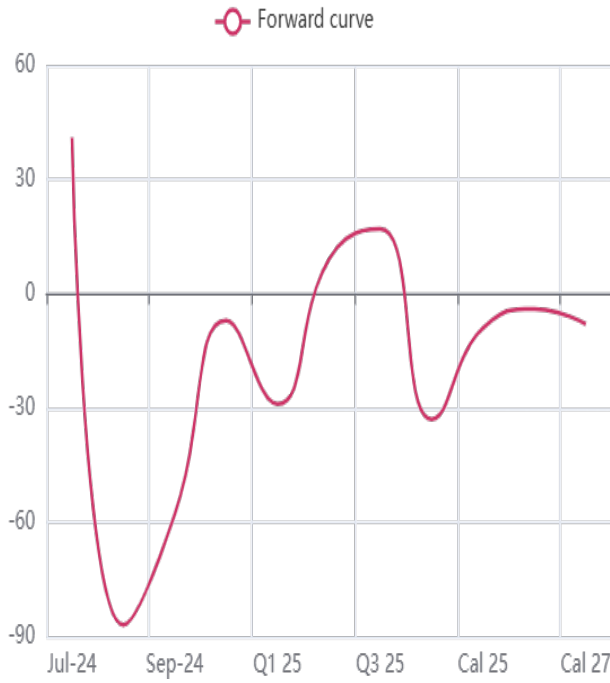
巴拿马型散货船Panamax

4TC	\$/day	WoW	
Jul-24	13,636.00	-35.0	-0.3 %
Aug-24	14,671.00	-168.0	-1.1 %
Sep-24	15,671.00	-79.0	-0.5 %
Q4 24	15,759.33	-105.0	-0.7 %
Q1 25	12,843.00	29.0	0.2 %
Q2 25	14,275.00	18.0	0.1 %
Q3 25	14,050.00	39.0	0.3 %
Q4 25	13,714.00	-7.0	-0.1 %
Cal 25	13,720.50	19.75	0.1 %
Cal 26	12,729.25	-13.75	-0.1 %
Cal 27	12,393.00	0.0	0.0 %



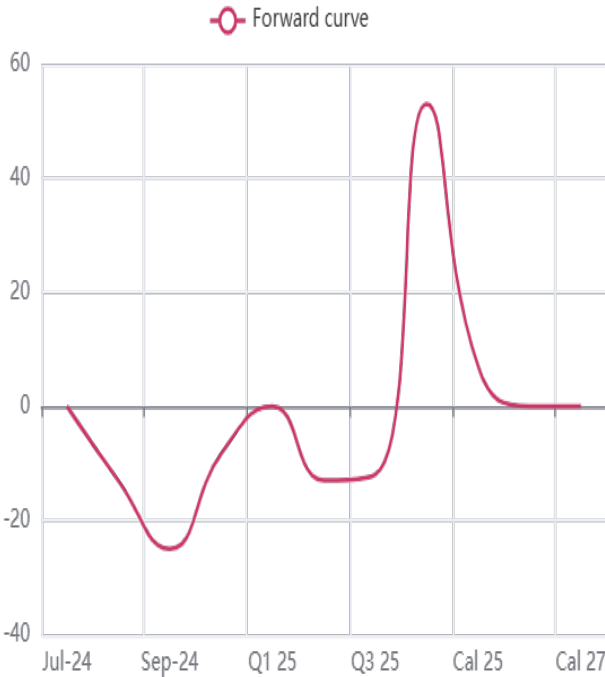
超大灵便型散货船Supramax

10TC	\$/day	WoW	
Jul-24	14,883.00	41.0	0.3 %
Aug-24	15,121.00	-87.0	-0.6 %
Sep-24	15,675.00	-58.0	-0.4 %
Q4 24	15,340.33	-7.0	0.0 %
Q1 25	12,204.00	-29.0	-0.2 %
Q2 25	13,692.00	9.0	0.1 %
Q3 25	13,550.00	17.0	0.1 %
Q4 25	13,670.00	-33.0	-0.2 %
13,279.00	Cal 25	-9.0	-0.1 %
Cal 26	12,567.00	-4.0	0.0 %
Cal 27	12,267.00	-8.0	-0.1 %



灵便型散货船Handysize

7TC	\$/day	WoW	
Jul-24	13,588.00	0.0	0.0 %
Aug-24	14,175.00	-13.0	-0.1 %
Sep-24	14,575.00	-25.0	-0.2 %
Q4 24	14,237.67	-8.33	-0.1 %
Q1 25	11,225.00	0.0	0.0 %
Q2 25	12,500.00	-13.0	-0.1 %
Q3 25	12,338.00	-12.0	-12.0
Q4 25	12,789.00	53.0	0.4 %
Cal 25	12,213.00	7.0	0.1 %
Cal 26	11,719.00	0.0	0.0 %
Cal 27	11,525.00	0.0	0.0 %



第六部分 燃油价格 BUNKER PRICE

MP	LO	HO	MO	SP	WoW	W%	M%
zhoushan	627.0	545.0	788.5	82.0	-12.0	-12.77	17.99
Singapore	627.0	526.0	746.5	101.0	-4.5	-4.27	23.17
Rotterdam	580.0	510.5	750.0	69.5	1.0	1.46	13.93
Fujairah	610.5	496.5	784.0	114.0	0.0	0.0	11.76
Houston	629.5	518.0	844.0	111.5	-0.5	-0.45	17.99

(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	201.0		-6.0	-2.9	-5.63	-15.58
Maize	198.0		1.0	0.51	-5.71	-13.53
Soybeans	217.0		-11.0	-4.82	-4.82	-20.75
Rice	246.0		-3.0	-1.2	-4.28	16.04
Barley	211.0		-4.0	-1.86	-3.21	-5.88
Energy	Index		+/-	Weekly	Monthly	YTD
Crude Oil	USD/Bbl	82.26	-0.32	-0.39	3.9	11.98
Brent	USD/Bbl	85.02	-1.09	-1.27	2.09	8.5
Natural Gas	USD/MMBtu	2.27	-0.05	-2.16	-18.93	-14.98
Gasoline	USD/Gal	2.51	-0.04	-1.57	3.72	-2.71
Heating Oil	USD/Gal	2.51	-0.07	-2.71	0.8	-1.57
Ethanol	USD/Gal	1.92	0.02	1.05	0.0	-17.6
Naphtha	USD/T	696.34	-9.45	-1.34	7.37	27.13
Propane	USD/Gal	0.81	-0.04	-4.71	8.0	39.66
Uranium	USD/Lbs	86.15	0.5	0.58	-0.58	54.81
Methanol	CNY/T	2523.0	10.0	0.4	1.24	17.57
TTF Gas	EUR/MWh	31.64	-1.66	-4.98	-8.48	-0.82
UK Gas	GBp/thm	72.84	-4.78	-6.16	-10.78	-7.21
Industrial	Index		+/-	Weekly	Monthly	YTD
Copper	USD/Lbs	4.57	-0.04	-0.87	3.39	22.19
Coal	USD/T	133.85	-1.9	-1.4	-0.96	-3.01
Steel	CNY/T	3299.0	24.0	0.73	-3.23	-9.89
Iron Ore	USD/T	109.58	-1.73	-1.55	2.1	-2.6
Aluminum	USD/T	2471.5	-63.5	-2.5	-0.96	14.63
Lithium	CNY/T	90500.0	-1000.0	-1.09	-7.18	N/A
Metals	Index		+/-	Weekly	Monthly	YTD
Gold	USD/t.oz	2407.6	27.4	1.15	3.74	25.15
Silver	USD/t.oz	30.7	-0.3	-0.97	4.42	33.13
Platium	USD/t.oz	990.8	-26.4	-2.6	2.48	8.41
Currencies	Index		+/-	Weekly	Monthly	YTD
EUR/USD	1.09		0.01	0.93	1.87	-0.91
USD/CNY	7.28		-0.01	-0.14	0.14	0.41

第八部分 本周话题 WEEKLY TOPIC



红海海洋环境正面临空前风险

HiFleet航运大数据7月16号报道了一艘希腊阿芙拉型油轮在红海被无人船袭击，胡塞武装在其网站上发布了视频片段并声称袭击了希腊船东的“Chios Lion”号油轮，导致该轮左舷巨大爆炸，火光冲天。据HiFleet船舶档案数据显示，107500载重吨的“Chios Lion”号油轮（建于2010年），悬挂利比里亚船旗，受益船东为希腊公司。该船从黑海东岸的图阿普谢港出发，行经地中海，在红海靠近也门附近海域时遭到无人艇炸弹袭击。卫星图像显示，红海出现了一条超过125英里的油污带。油污带从也门霍代达市西北约60英里处延伸，向北延续。7月14日的卫星图像中没有发现该油污，而在7月16日的卫星图像中则出现了这一现象。

胡塞武装已经对红海的船只进行了数月的攻击，以抗议以色列与哈马斯的战争。尽管许多船只选择避开该地区，绕道数千英里航行至非洲，但仍有一些船只冒险通过。今年6月红海胡塞武装的攻击活动显著增加，成为今年迄今为止最活跃的时期，最终导致两艘船只被击沉。一艘是希腊船东82000载重吨的散货船，该船同样是左舷遭受无人艇炸弹袭击；另外一艘名为“Verbena”的乌克兰件杂货船在亚丁湾西行时遭到胡塞武装的导弹袭击后起火，火势不可控，船员被迫弃船逃生，该船最后也不久后沉没。今年早些时候，胡塞武装还击沉了一艘名为Rubymar的船只，造成了化肥泄漏。今年以来其他船只也遭受了不同程度的损坏，有的继续前往目的地，有的则在等待专业人员进行救助。

在这一水道中，商业船只正持续受到也门胡塞武装的攻击，这是红海环境的灾难。船舶的沉没更会给附近海洋环境带来灾难性影响，特别是船上泄漏出的燃油和各种油类，万一有害物质进入海洋，那对周边敏感的海生物带来灭顶之灾。

On July 16, HiFleet reported that a Greek Aframax tanker was attacked by a drone boat in the Red Sea. The Houthi forces released video footage on their website claiming responsibility for the attack on the Greek-owned tanker "Chios Lion," which resulted in a massive explosion on the vessel's port side, sending flames into the sky. According to HiFleet's ship registry data, the "Chios Lion," a 107,500 deadweight tanker built in 2010 and flying the Liberian flag, is owned by a Greek company. The ship had departed from Tuapse Port on the eastern Black Sea, transited through the Mediterranean, and was attacked by a drone bomb in the Red Sea near Yemen. Satellite imagery revealed an oil slick over 125 miles long in the Red Sea, extending northward from approximately 60 miles northwest of Hodeidah, Yemen. The satellite images from July 14 did not show this oil slick, while it appeared in the images from July 16.

The Houthi forces have been attacking vessels in the Red Sea for several months in protest against the war between Israel and Hamas. Although many ships have chosen to avoid the area, rerouting thousands of miles to Africa, some vessels still risk passing through. In June, Houthi attacks in the Red Sea surged significantly, marking the most active period of the year so far, ultimately leading to the sinking of two ships. One was an 82,000 deadweight ton bulk carrier owned by a Greek company, which also suffered a drone bomb attack on its port side; the other was a Ukrainian cargo ship named "Verbena," which caught fire after being struck by a missile from Houthi forces while heading west in the Gulf of Aden. The fire became uncontrollable, forcing the crew to abandon ship, and it subsequently sank shortly thereafter. Earlier this year, the Houthis also sank a vessel named Rubymar, resulting in a fertiliser leak. Other ships have sustained varying degrees of damage this year, with some continuing to their destinations while others await assistance from salvage professionals.

Commercial vessels are under ongoing attack from Houthi forces in this waterway, creating a disaster for the Red Sea environment. The sinking of ships could have catastrophic effects on the surrounding marine ecosystem, particularly due to the leakage of fuel and other oils. Should harmful substances enter the ocean, they pose a grave threat to the sensitive marine life in the sea around.

A handwritten signature in black ink, appearing to be 'Li Hongtao' (刘红涛), written in a cursive style. The signature is located in the bottom right corner of the page.