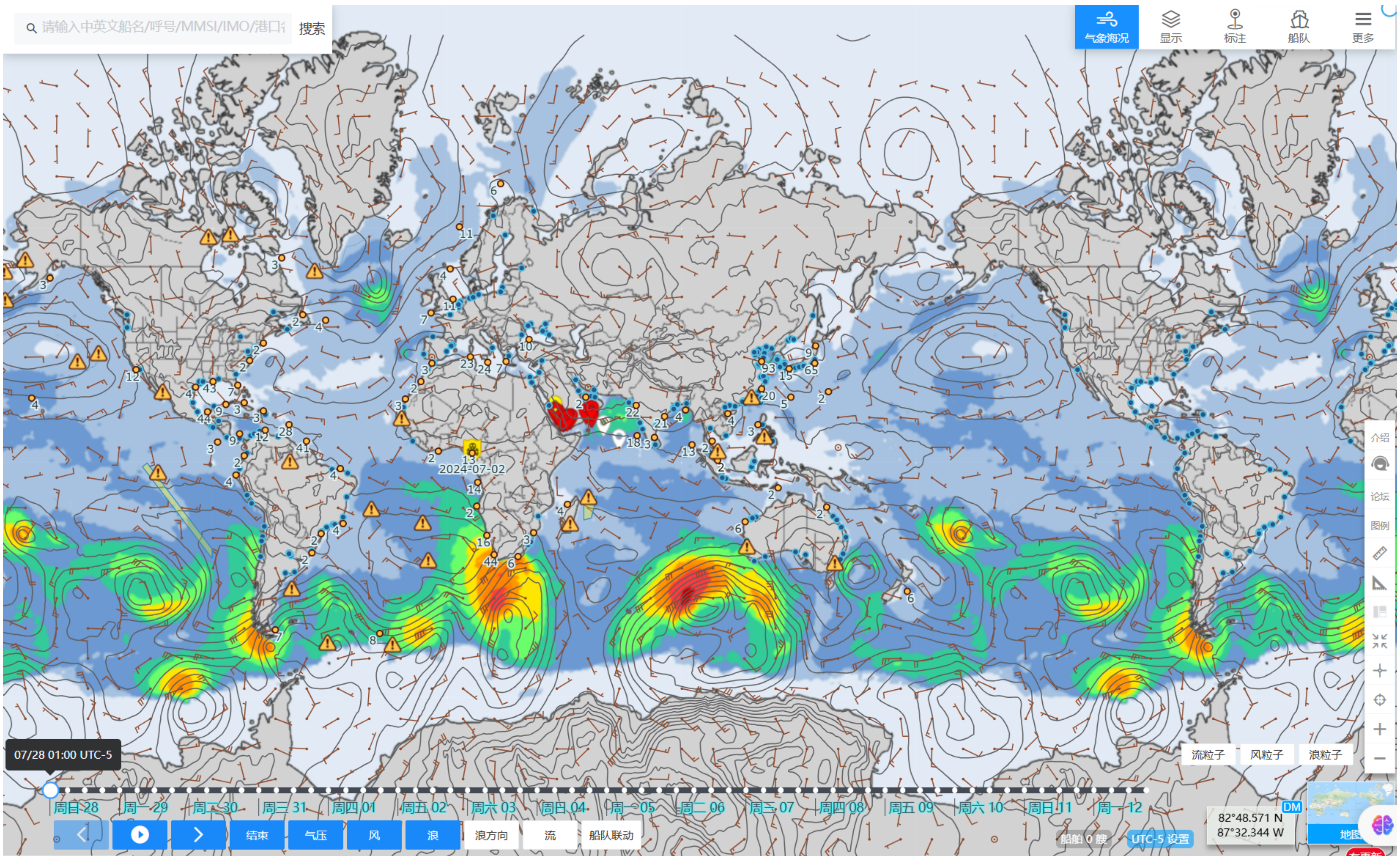
2024年
第30周市场周报

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828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 828 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4-5级，相关海域1米轻浪；黄海风力减弱到4-5级，相关海域中浪；东海风力未来将经历4-5级，相关海域中浪；台湾海峡风力将经历4-5级，台湾海峡中浪；南海大部海域风力减弱到3-4级，轻浪。西北太平洋的热带风暴和台风开始频繁发生。The coming week the wind in Bohai Sea stays moderate breeze with slight seas. Yellow Sea weak to moderate with moderate wave. And China East Sea shall experience moderate with moderate wave as well. The wind in the Taiwan Strait will experience moderate and the sea there experience moderate. In most of the South China Sea the wind becomes gentle with slight wave. There are low-pressures developing frequently in the North of the Pacific Ocean.

海盗事件 Piracy

2024年7月20日，印度尼西亚Kuala Tanjung锚地。三名持有长刀的盗贼登上一艘停泊的散货船。他们进入机舱，劫持了值班的机务人员并将其绑住。在离开船只之前，他们盗走了船上的发动机备件，释放了被绑的值班人员并逃跑。警报被拉响，船员集合，事件通过代理报告给港口设施。20.07.2024: 2040 UTC: Posn: 03:26N – 099:27E, Kuala Tanjung Anchorage, Indonesia. Three robbers armed with long knives boarded an anchored bulk carrier. They entered the engine room, took hostage the duty engine crew and tied him up. Before leaving the vessel, they stole ship's engine spares, released the duty crew, and escaped. Alarm raised, crew mustered and the incident was reported to the Port Facility through the agent.

海上事件 Marine Incidents

7月19日，马士基运营的"Maersk Frankfurt"号在印度西海岸发生火灾，7月21日确认一名菲律宾籍海员不幸遇难，目前明火已被扑灭。On July 19, Maersk-operated "Maersk Frankfurt" in the west coast of India, a fire was confirmed. On July 21, a Filipino sailor was killed, and the open fire has been extinguished so far.

其它 Others

没有 Nil

备注 Remark

本报告数据截止时间为2024年7月28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 28th of 2024; All data and/or opinions are for reference only and under no circumstances do the Company and its employees assume any risk.

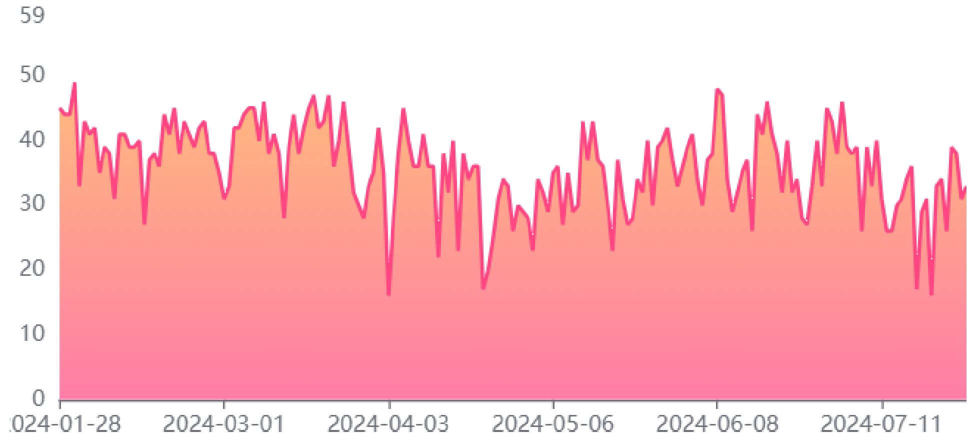
第二部分 航运数据 SHIPPING DATA

最近一周船舶运河/河口锚地等待数量

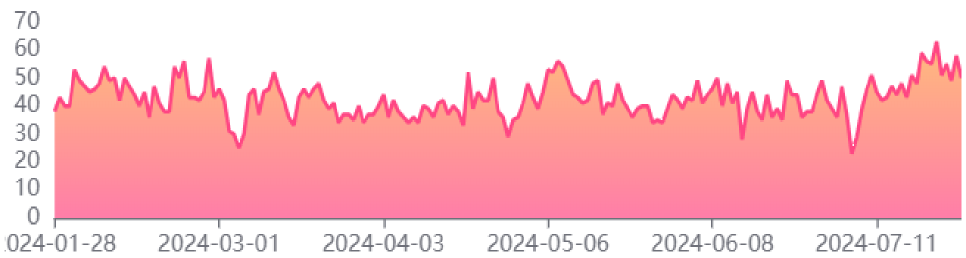
Latest Week Update Vessel Waiting Numbers Information in Anchorages of Canals and Rivers

Canal/Riv.	P.N.	M.N.	WoW	MoM
Suez.Red	50	1345	41	136
Miss.Riv.	4	68	15	8
CJK	178	6242	-82	1138
Pa.Atlan.	64	1565	10	51
Colum.Riv.	7	174	9	61
Suez.Med.	33	967	26	-94
Pa.Pac.	47	1371	-7	-75
ZJK	43	3304	20	-24

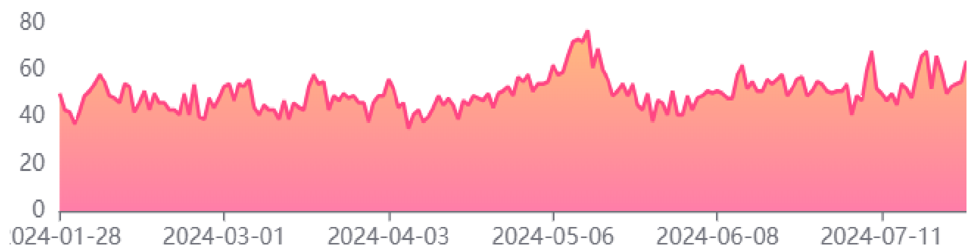
Suez(Mediterranean-Red Sea)



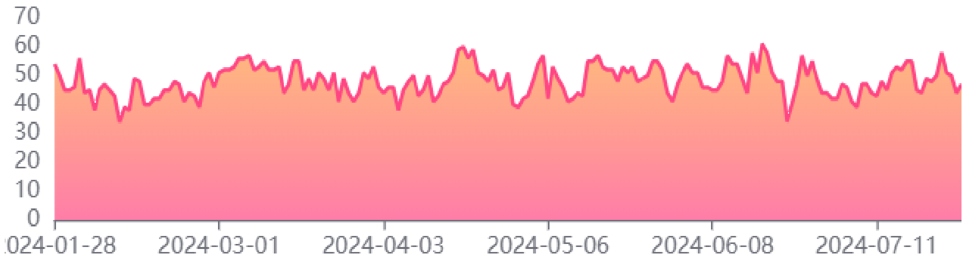
Suez(Red Sea-Mediterranean)



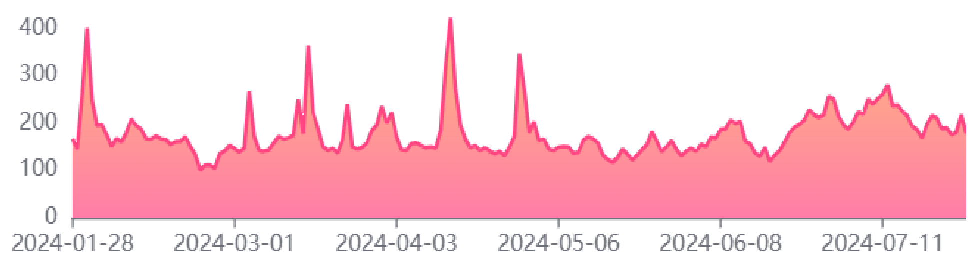
Panama(Atlantic-Pacific)



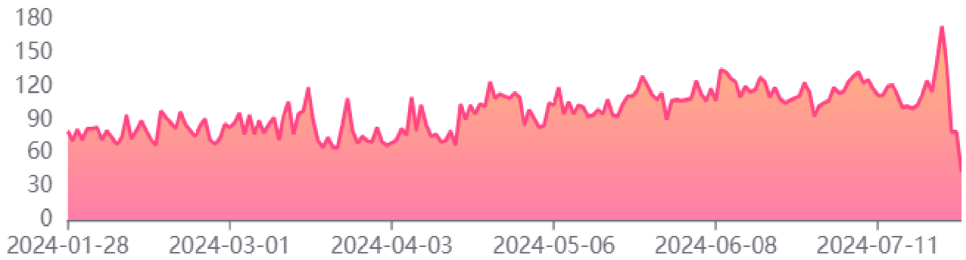
Panama(Pacific-Atlantic)



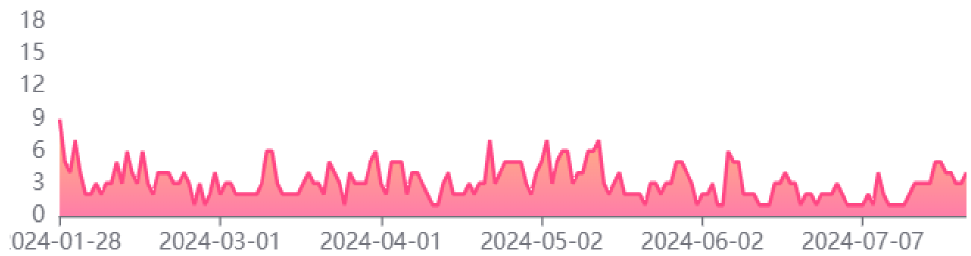
Changjiangkou(Estuary)



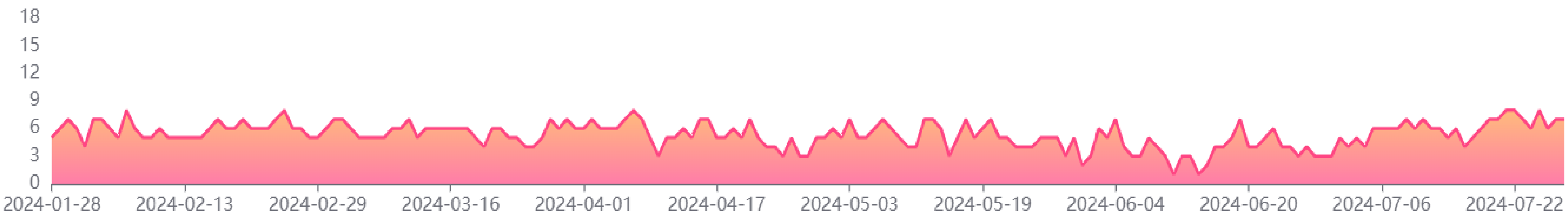
Zhujiangkou(Estuary)



Mississippi River(Estuary)



Columbia River(Estuary)

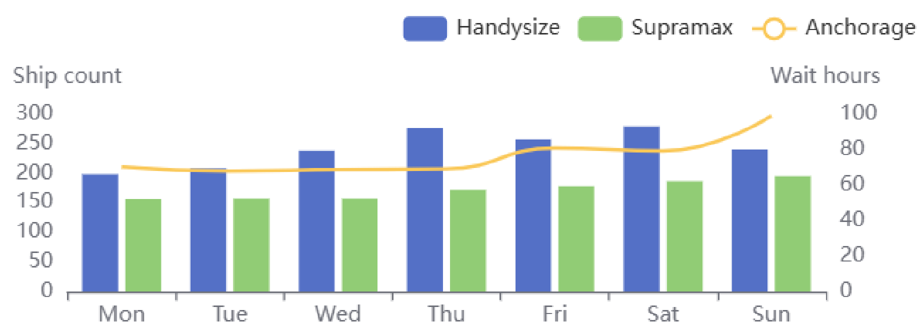


(P.N-Present Number; M.N.-Month Number; WoW-Week on Week; MoM-Month on Month)

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

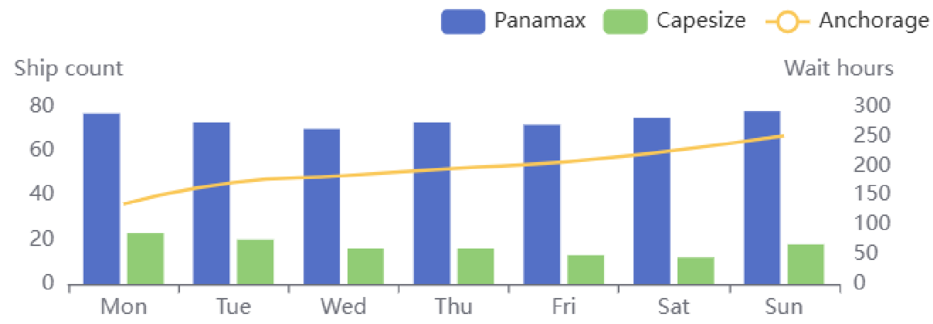
Type	M	T	W	Th	F	Sat	Sun
HDY	198	208	238	276	257	279	240
SMX	156	157	157	172	178	186	195
WT.h.	70.2	67.9	68.7	69.1	80.8	79.2	99



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

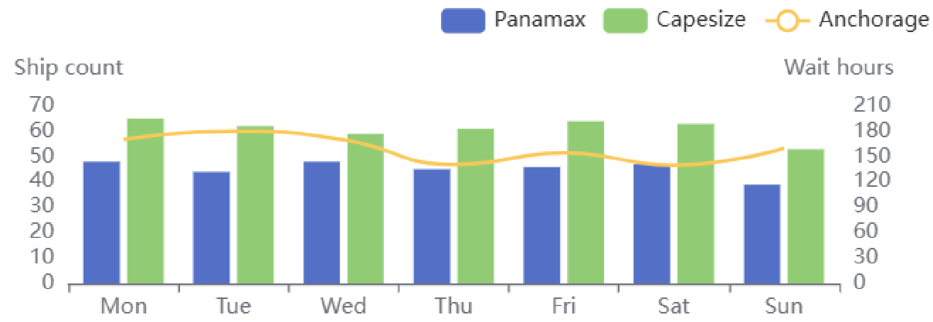
Type	M	T	W	Th	F	Sat	Sun
Pan.	77	73	70	73	72	75	78
Cap	23	20	16	16	13	12	18
WT.h.	135.3	171.9	183.3	195.7	206.6	226.1	251



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

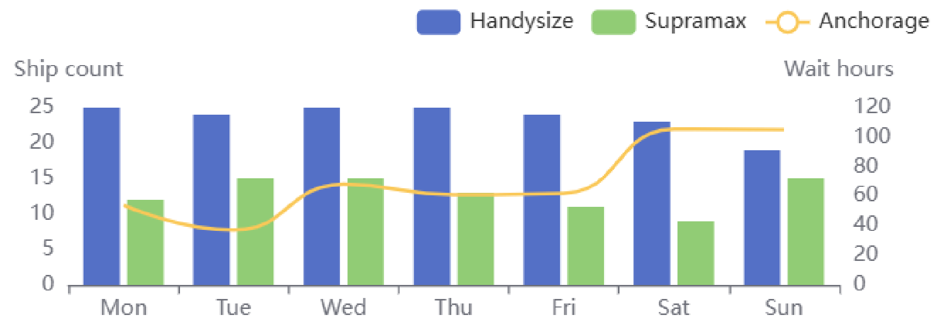
Type	M	T	W	Th	F	Sat	Sun
Pan.	48	44	48	45	46	47	39
Cap	65	62	59	61	64	63	53
WT.h.	170.7	180.3	170	140.6	154.4	140	160



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

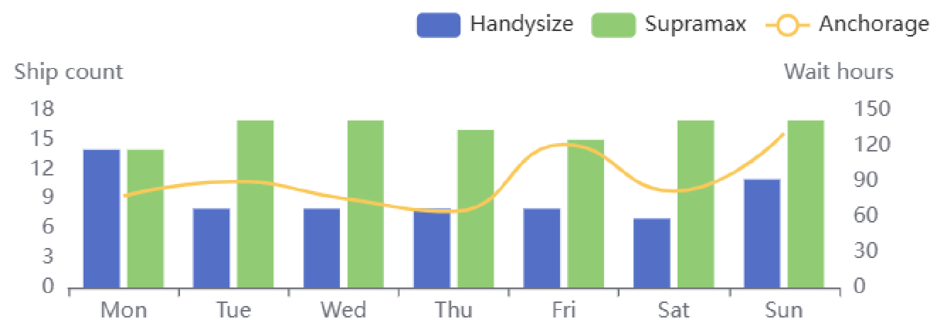
Type	M	T	W	Th	F	Sat	Sun
HDY	25	24	25	25	24	23	19
SMX	12	15	15	13	11	9	15
WT.h.	53.9	37.1	68.05	60.95	62	105.3	105



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

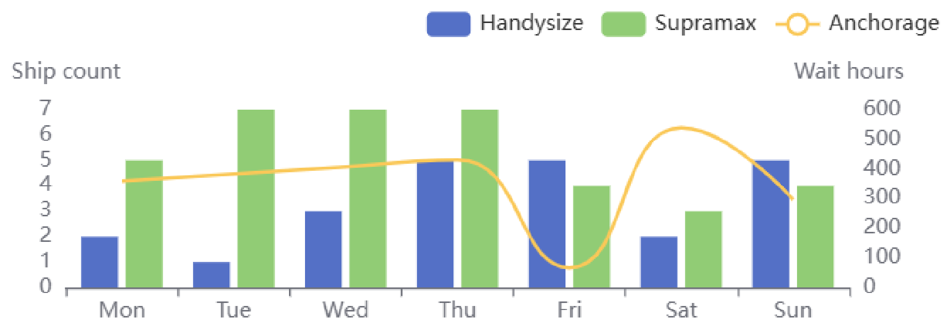
Type	M	T	W	Th	F	Sat	Sun
HDY	14	8	8	8	8	7	11
SMX	14	17	17	16	15	17	17
WT.h.	77.4	89.8	75.3	64.45	121.1	81.55	130.5



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

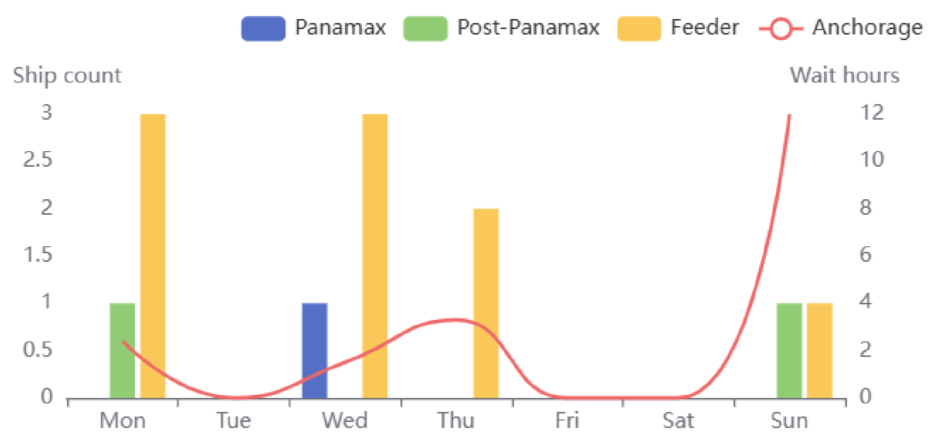
Type	M	T	W	Th	F	Sat	Sun
HDY	2	1	3	5	5	2	5
SMX	5	7	7	7	4	3	4
WT.h.	359	383	407	431	66.6	538.8	297



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

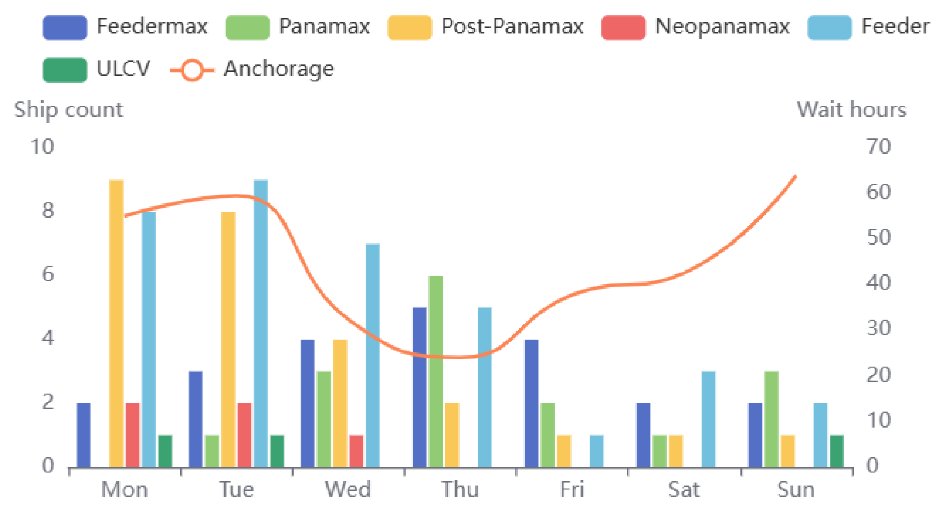
Type	M	T	W	Th	F	Sat	Sun
F.ma.	0	0	0	0	0	0	0
Pan.	0	0	1	0	0	0	0
PPx	1	0	0	0	0	0	1
NPx	0	0	0	0	0	0	0
Fd	3	0	3	2	0	0	1
WT.h.	2.4	0.0	1.5	3.3	0.0	0.0	12
Ulcv	0	0	0	0	0	0	0



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

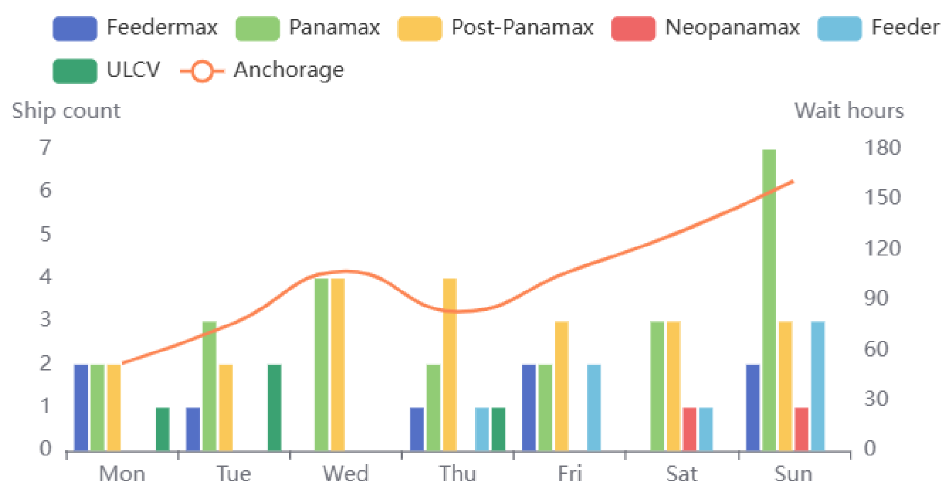
Type	M	T	W	Th	F	Sat	Sun
F.ma.	2	3	4	5	4	2	2
Pan.	0	1	3	6	2	1	3
PPx	9	8	4	2	1	1	1
NPx	2	2	1	0	0	0	0
Fd	8	9	7	5	1	3	2
Ulcv	1	1	0	0	0	0	1
WT.h.	55.1	59.6	32.4	24	37.8	42.6	64



最近一周新加坡区域集装箱船锚泊数量和平均锚泊时长

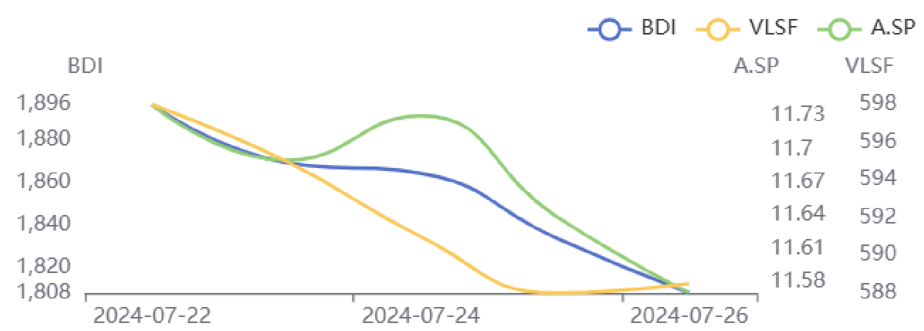
Latest Week Update for Container Vessels Num. and Waiting Time Information in Anchorages of Singapore

Type	M	T	W	Th	F	Sat	Sun
F.ma.	2	1	0	1	2	0	2
Pan.	2	3	4	2	2	3	7
PPx	2	2	4	4	3	3	3
NPx	0	0	0	0	0	1	1
Fd	0	0	0	1	2	1	3
Ulcv	1	2	0	1	0	0	0
WT.h.	52.2	76.2	107.05	83.1	107.1	131.1	161



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

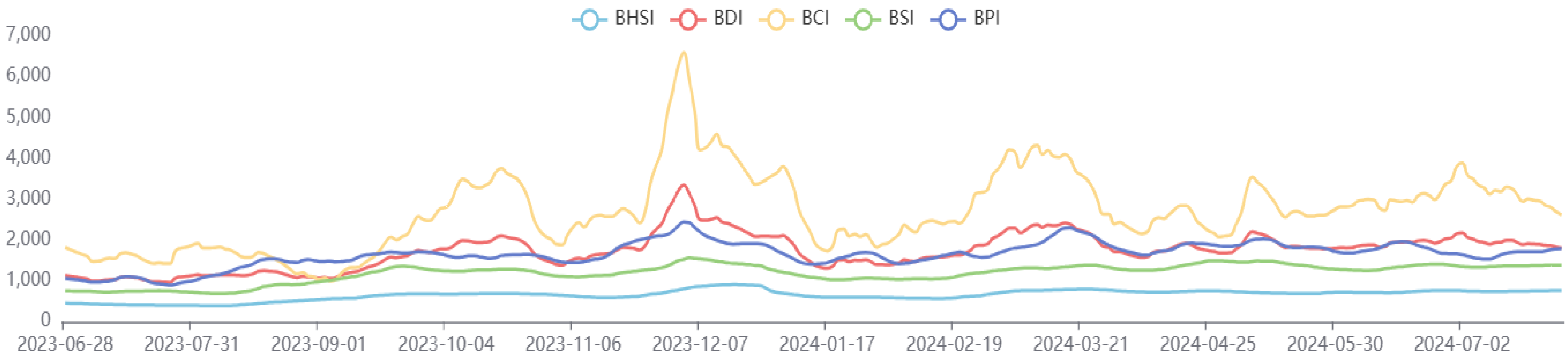
Type	M	T	W	Th	F	Sat	Sun
BDI	1712	1728	1765	1785	1792		
VLSF	598.00	595.00	591.00	588.00	588.50		
A.SP	11.74	11.69	11.73	11.64	11.57	11.72	



第三部分 航运市场 SHIPPING MARKET

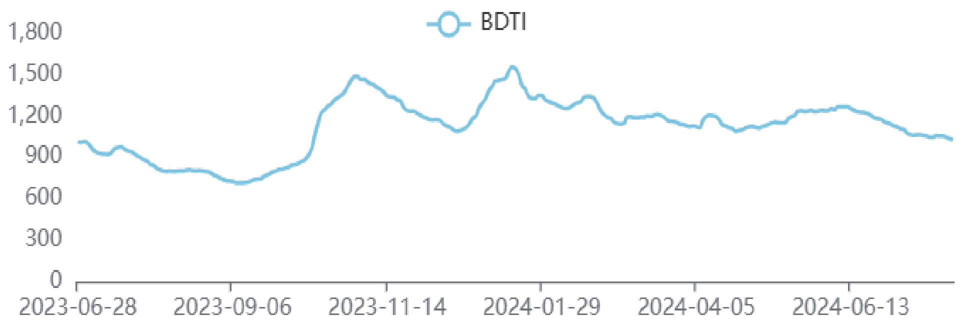
波罗的海干散货指数Baltic Dry Index

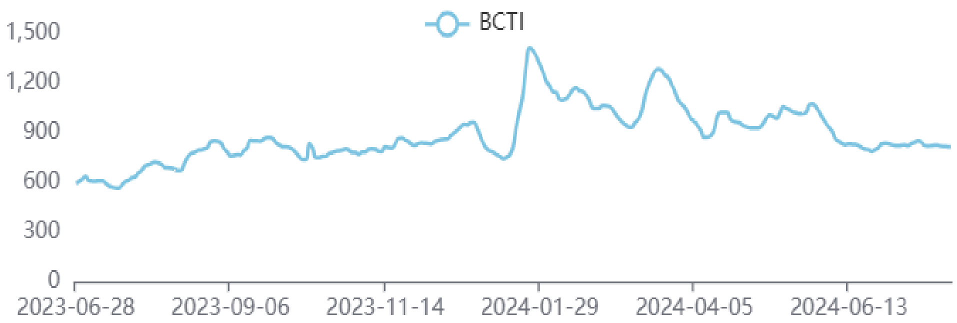
Type	PI	WoW	W%	M%	y%
BDI	1808	-94.0	-4.94	-11.8	69.45
BCI	2614	-359.0	-12.08	-24.08	50.75
BPI	1792	78.0	4.55	7.5	95.63
BSI	1386	12.0	0.87	0.07	86.79
BHSI	759	7.0	0.93	-0.52	90.23

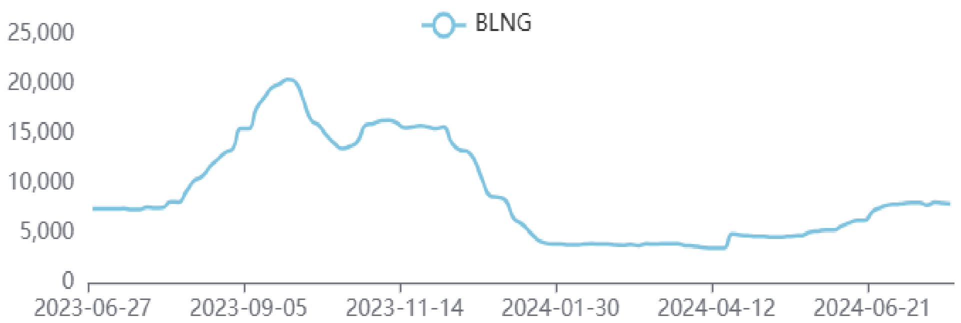


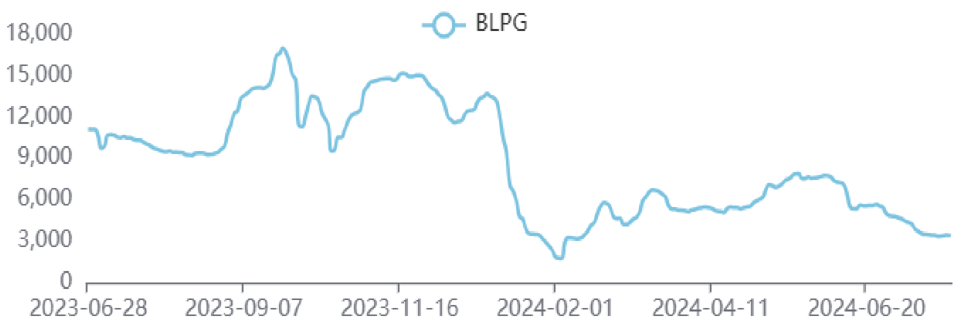
能源运价指数Energy Shipping Index

Type	PI	WoW	W%	M%	y%
BDTI	1023	-33.0	-3.13	-11.04	13.79
BCTI	814	-8.0	-0.97	-2.4	24.27
BLNG	7887	-180.0	-2.23	1.08	4.46
BLPG	3379	-41.0	-1.2	-32.55	-65.93

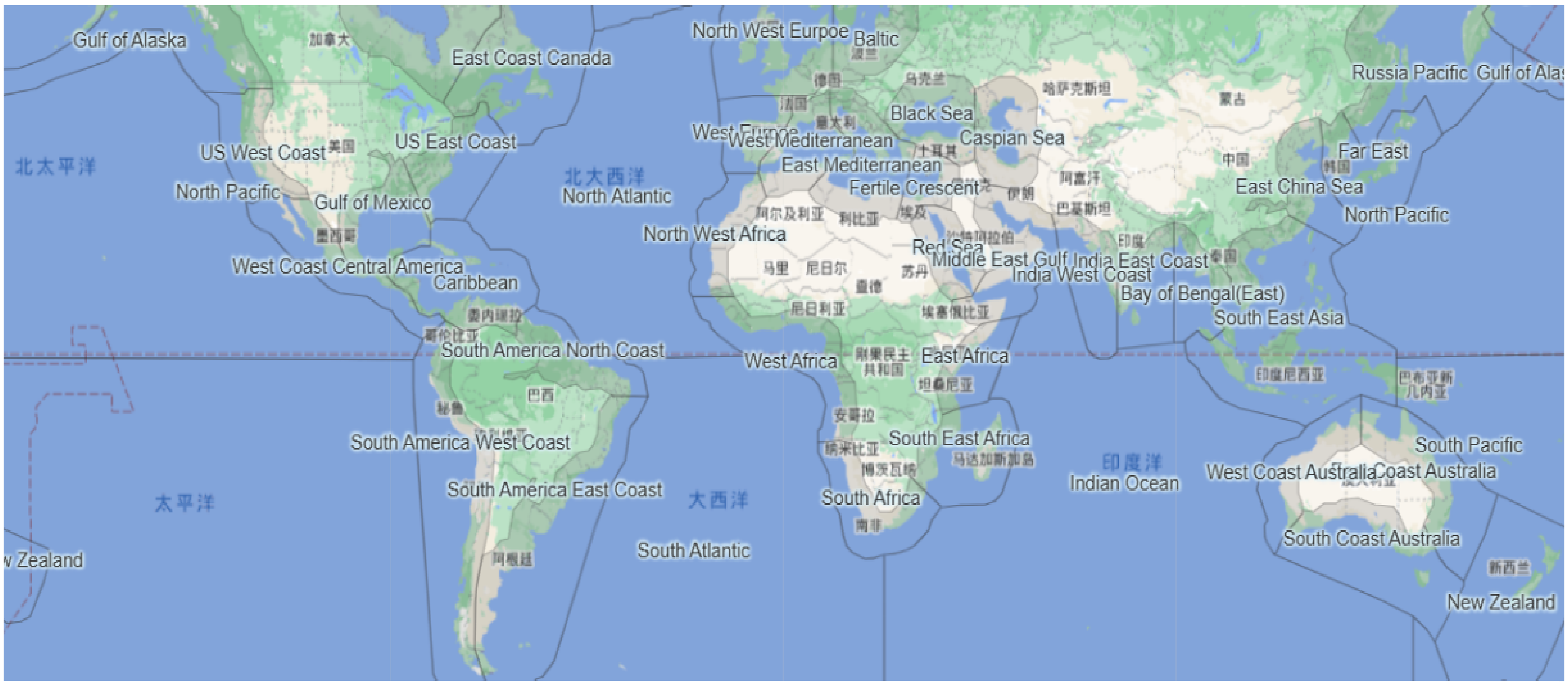








第四部分 运力分布 SUPPLY DISTRIBUTION

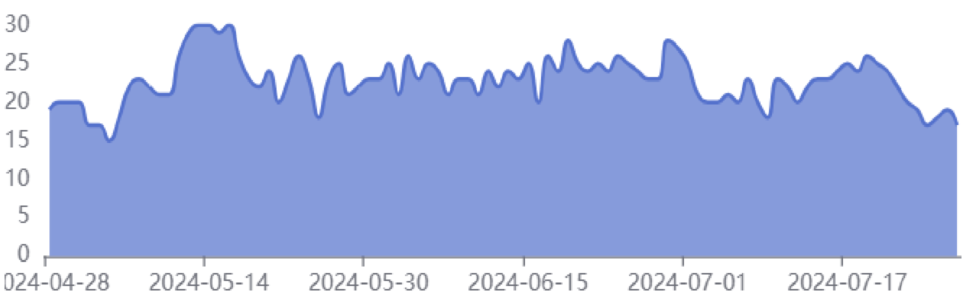


好望角型散货船 Capesize

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.

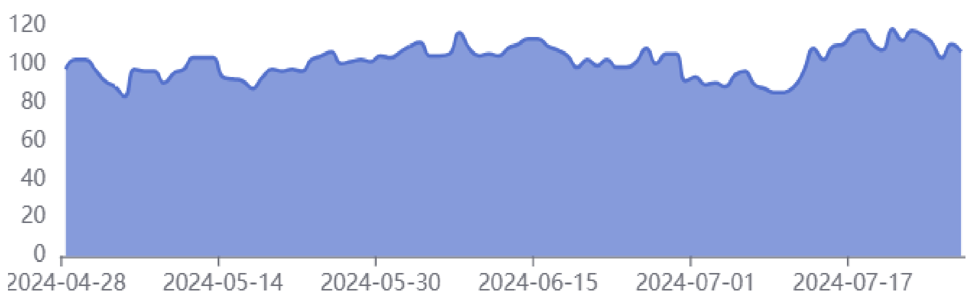
Type	M	T	W	Th	F	Sat	Sun
Cape	22	20	19	17	18	19	17



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.

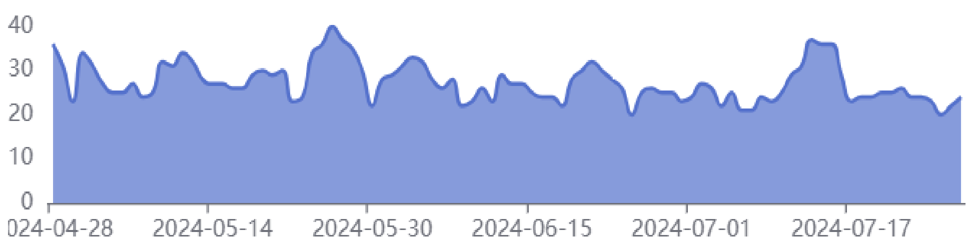
Type	M	T	W	Th	F	Sat	Sun
Cape	112	117	115	111	103	110	106



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	24	24	23	20	22	24

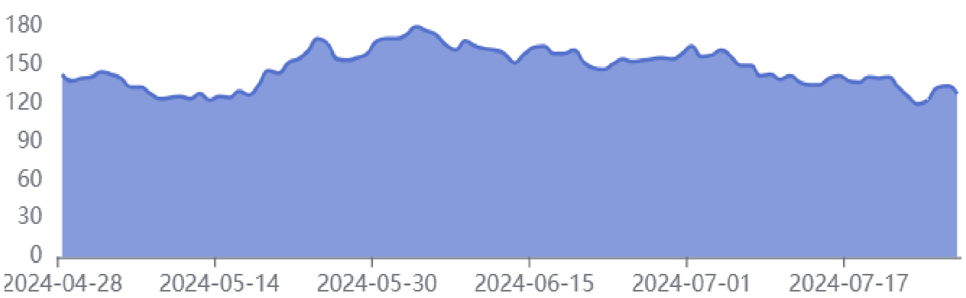


巴拿马型散货船 PANAMAX

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.

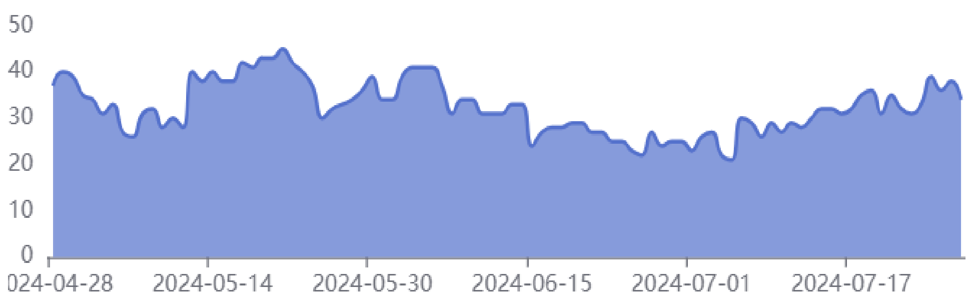
Type	M	T	W	Th	F	Sat	Sun
Pan.	132	125	119	122	132	133	127



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.

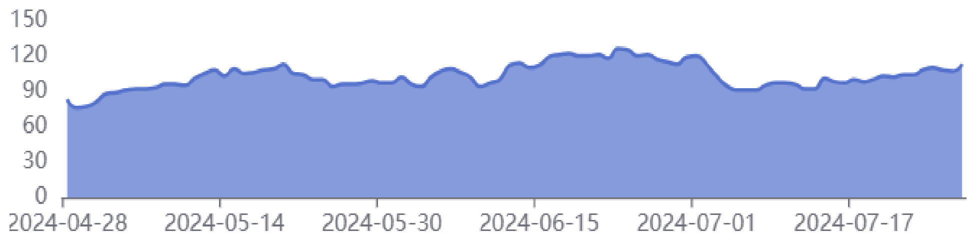
Type	M	T	W	Th	F	Sat	Sun
Pan.	16	18	19	23	25	24	24



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.	104	104	108	110	108	107	113

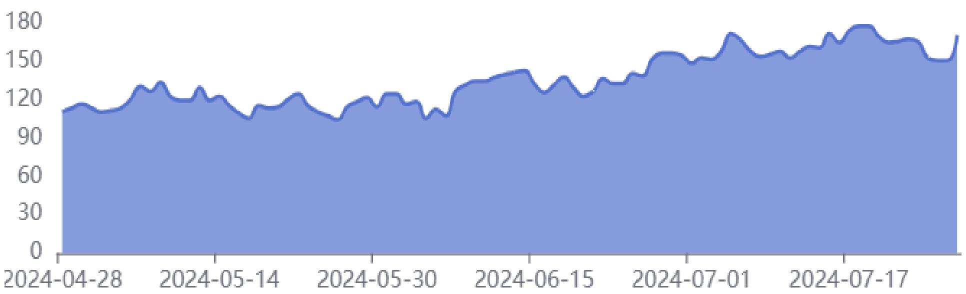


超大灵便型散货 SUPRAMAX

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.

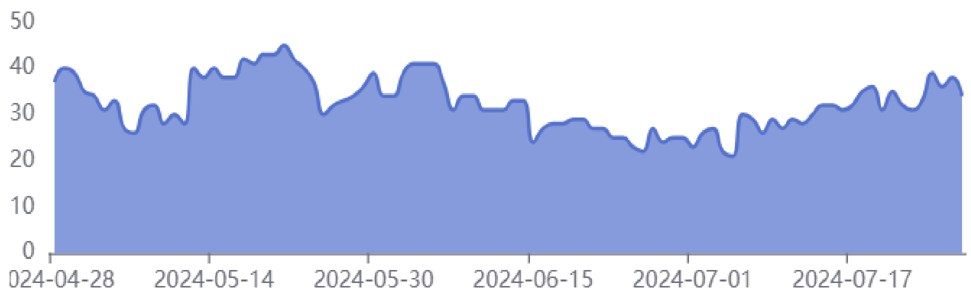
Type	M	T	W	Th	F	Sat	Sun
SMX	165	167	165	152	150	150	170



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.

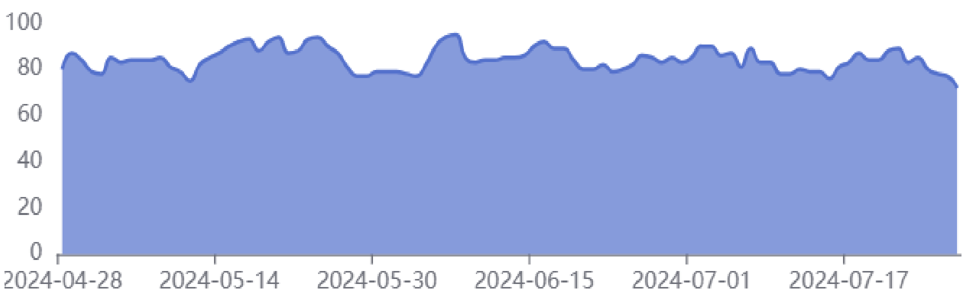
Type	M	T	W	Th	F	Sat	Sun
SMX	32	31	33	39	36	38	34



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.

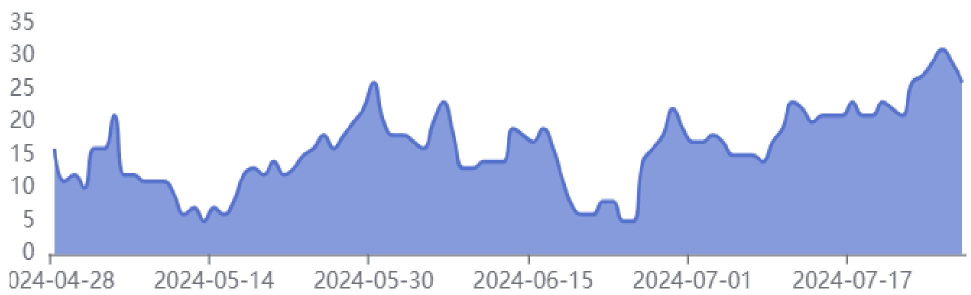
Type	M	T	W	Th	F	Sat	Sun
SMX	21	26	27	29	31	29	26



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.

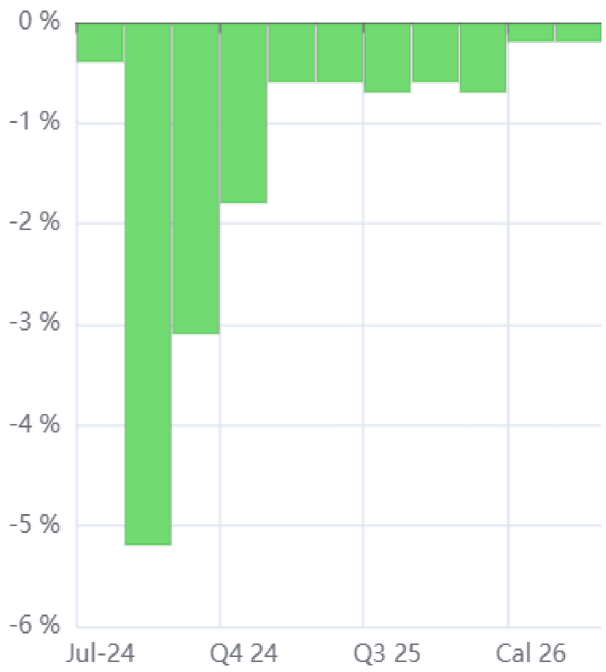
Type	M	T	W	Th	F	Sat	Sun
SMX	89	83	85	80	78	77	72

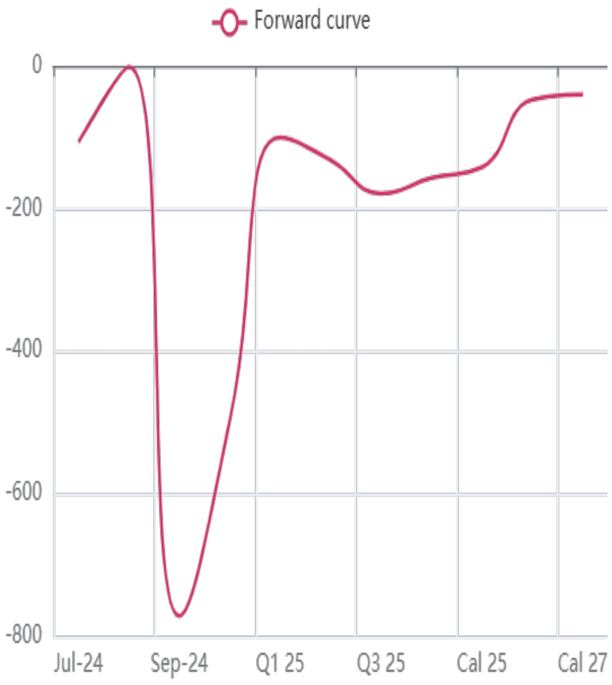


第五部分 远期运价协议 FFA

好望角型散货船Capesize

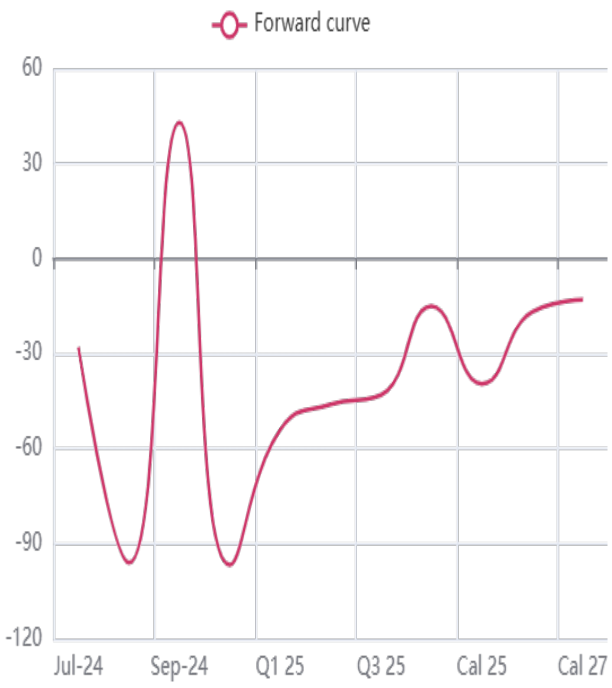
5TC	$/day	WoW	
Jul-24	25,639.00	-107.0	-0.4 %
Aug-24	21,014.00	-1161.0	-5.2 %
Sep-24	24,032.00	-772.0	-3.1 %
Q4 24	26,945.67	-498.33	-1.8 %
Q1 25	16,182.00	-100.0	-0.6 %
Q2 25	21,257.00	-132.0	-0.6 %
Q3 25	24,607.00	-179.0	-0.7 %
Q4 25	24,557.00	-157.0	-0.6 %
Cal 25	21,650.75	-142.0	-0.7 %
Cal 26	21,031.75	-47.25	-0.2 %
Cal 27	20,146.00	-40.0	-0.2 %





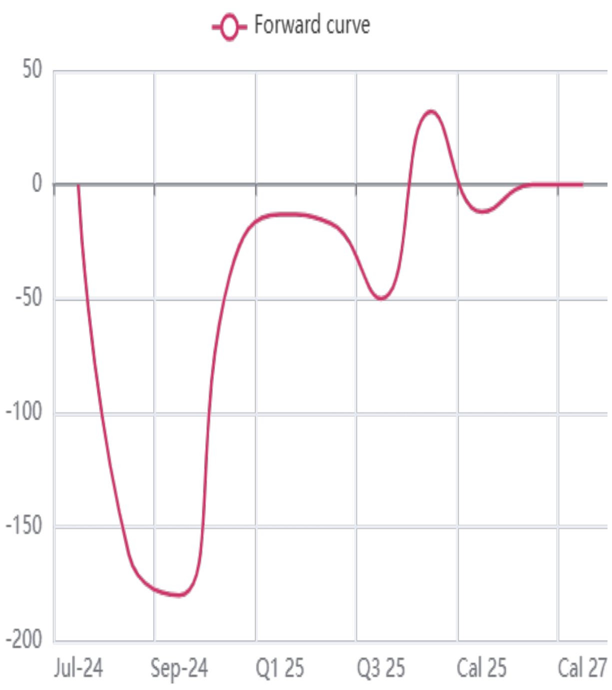
巴拿马型散货船Panamax

4TC	$/day	WoW	
Jul-24	13,736.00	-28.0	-0.2 %
Aug-24	14,768.00	-96.0	-0.6 %
Sep-24	15,586.00	43.0	0.3 %
Q4 24	15,720.00	-96.67	-0.6 %
Q1 25	12,896.00	-54.0	-0.4 %
Q2 25	14,211.00	-46.0	-0.3 %
Q3 25	13,957.00	-43.0	-0.3 %
Q4 25	13,621.00	-15.0	-0.1 %
Cal 25	13,671.25	-39.5	-0.3 %
Cal 26	12,754.25	-16.75	-0.1 %
Cal 27	12,414.00	-13.0	-0.1 %



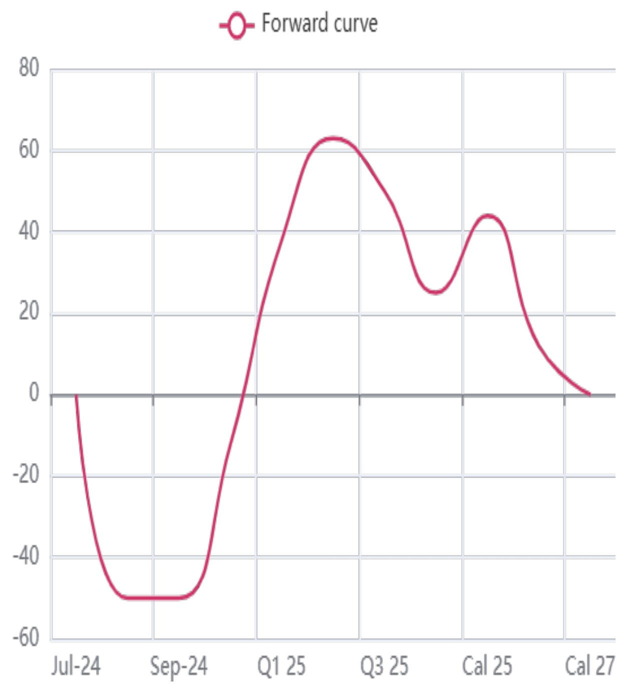
超大灵便型散货船Supramax

10TC	$/day	WoW	
Jul-24	14,958.00	0.0	0.0 %
Aug-24	15,217.00	-162.0	-1.1 %
Sep-24	15,608.00	-180.0	-1.1 %
Q4 24	15,335.00	-40.0	-0.3 %
Q1 25	12,383.00	-13.0	-0.1 %
Q2 25	13,733.00	-17.0	-0.1 %
Q3 25	13,592.00	-50.0	-0.4 %
Q4 25	13,760.00	32.0	0.2 %
13,367.00	Cal 25	-12.0	-0.1 %
Cal 26	12,596.00	0.0	0.0 %
Cal 27	12,283.00	0.0	0.0 %



灵便型散货船Handysize

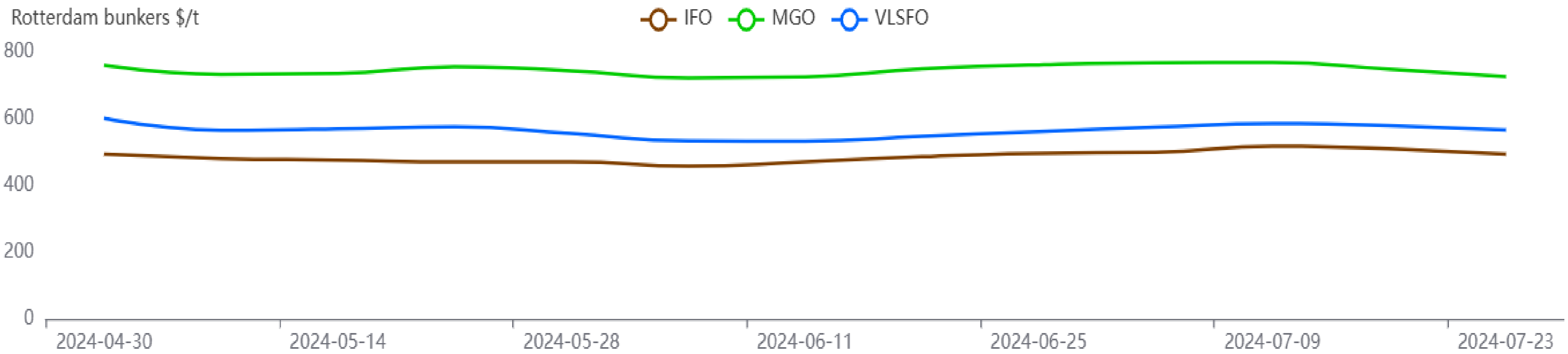
7TC	$/day	WoW	
Jul-24	13,550.00	0.0	0.0 %
Aug-24	14,213.00	-50.0	-0.4 %
Sep-24	14,563.00	-50.0	-0.3 %
Q4 24	14,283.67	-12.33	-0.1 %
Q1 25	11,319.00	38.0	0.3 %
Q2 25	12,588.00	63.0	0.5 %
Q3 25	12,463.00	50.0	50.0
Q4 25	12,982.00	25.0	0.2 %
Cal 25	12,338.00	44.0	0.4 %
Cal 26	11,750.00	12.0	0.1 %
Cal 27	11,525.00	0.0	0.0 %

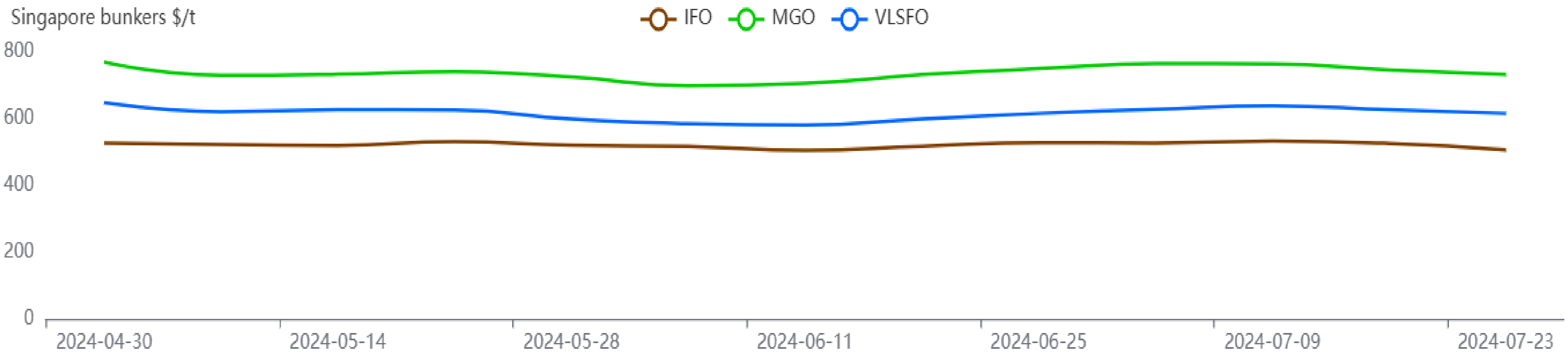


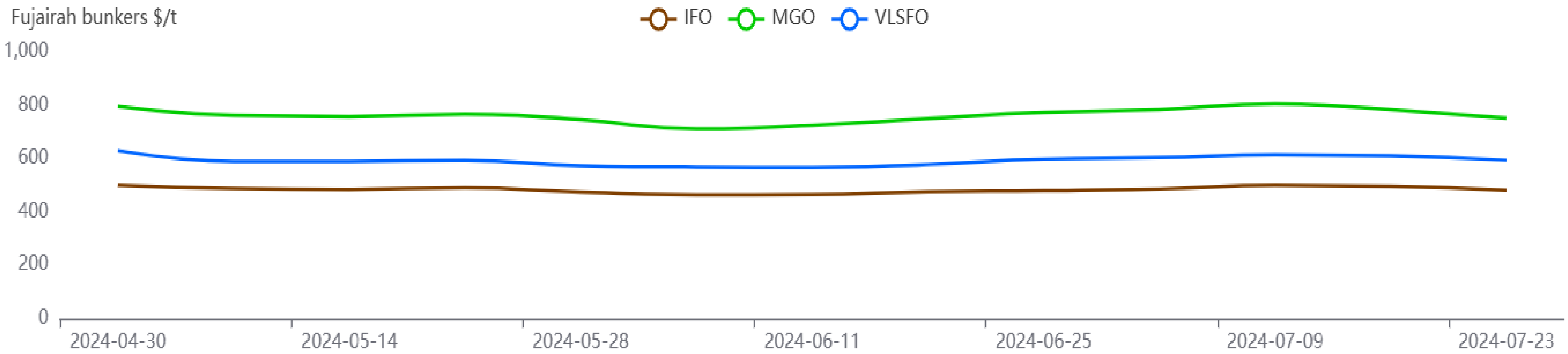
第六部分 燃油价格 BUNKER PRICE

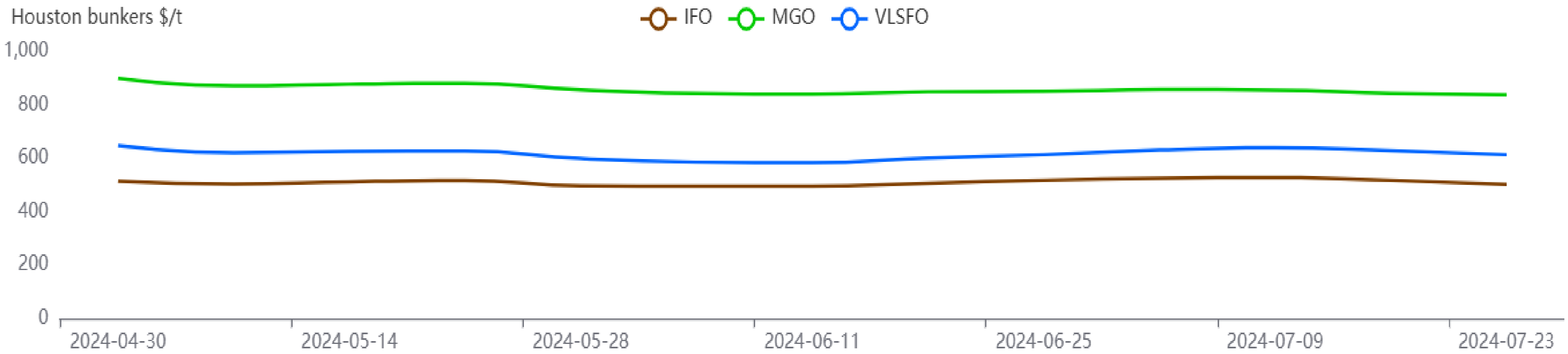
MP	LO	HO	MO	SP	WoW	W%	M%
zhoushan	614.5	527.5	770.0	87.0	5.0	6.1	51.3
Singapore	616.0	507.0	732.5	109.0	8.0	7.92	24.57
Rotterdam	567.5	494.5	727.0	73.0	3.5	5.04	12.31
Fujairah	594.0	481.0	752.5	113.0	-1.0	-0.88	-4.64
Houston	614.0	503.0	839.0	111.0	-0.5	-0.45	15.63

(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		200.0	-1.0	-0.5	-1.48	-15.97
Maize		197.0	-1.0	-0.51	-1.99	-16.87
Soybeans		216.0	-1.0	-0.46	-5.26	-22.5
Rice		247.0	1.0	0.41	-2.76	16.13
Barley		212.0	1.0	0.47	0.0	-5.94
Energy		Index	+/-	Weekly	Monthly	YTD
Crude Oil	USD/Bbl	78.9	-3.36	-4.08	-3.3	6.08
Brent	USD/Bbl	82.97	-2.05	-2.41	-3.55	5.4
Natural Gas	USD/MMBtu	2.17	-0.1	-4.41	-23.05	-15.89
Gasoline	USD/Gal	2.46	-0.05	-1.99	-1.99	-5.75
Heating Oil	USD/Gal	2.43	-0.08	-3.19	-3.57	-5.45
Ethanol	USD/Gal	1.82	-0.1	-5.21	-7.14	-26.61
Naphtha	USD/T	689.89	-6.45	-0.93	4.22	22.54
Propane	USD/Gal	0.79	-0.02	-2.47	5.33	27.42
Uranium	USD/Lbs	84.35	-1.8	-2.09	0.9	52.26
Methanol	CNY/T	2466.0	-57.0	-2.26	-0.68	9.16
TTF Gas	EUR/MWh	31.53	-0.11	-0.35	-9.71	25.02
UK Gas	GBp/thm	73.0	0.16	0.22	-10.47	17.74
Industrial		Index	+/-	Weekly	Monthly	YTD
Copper	USD/Lbs	4.21	-0.36	-7.88	-4.97	10.5
Coal	USD/T	135.1	1.25	0.93	2.43	2.58
Steel	CNY/T	3236.0	-63.0	-1.91	-3.83	-12.8
Iron Ore	USD/T	108.45	-1.13	-1.03	1.78	-7.31
Aluminum	USD/T	2338.5	-133.0	-5.38	-6.87	4.05
Lithium	USD/T	85500.0	N/A	N/A	N/A	75981.15
Metals		Index	+/-	Weekly	Monthly	YTD
Gold	USD/t.oz	2403.0	-4.6	-0.19	3.43	22.91
Silver	USD/t.oz	29.1	-1.6	-5.21	-1.36	17.29
Platium	USD/t.oz	960.2	-30.6	-3.09	-4.31	-0.7
Currencies		Index	+/-	Weekly	Monthly	YTD
EUR/USD		1.09	0.0	0.0	1.87	-2.68
USD/CNY		7.29	0.01	0.14	0.0	1.53

第八部分 本周话题 WEEKLY TOPIC

2024年上半年航运市场

HiFleet航运大数据每天都在监控海上大宗商品和集装箱运输情况，从2020年新冠疫情阻塞海上有效运输引发的航运市场大爆发；到2021年市场恢复生产和贸易的不平衡促成的航运强势；到2022年俄罗斯和乌克兰战争引发欧盟能源危机又促成能源运输市场的火爆，同时对俄罗斯原油和其成品油的出口制裁导致的巨大利益又驱使催生了一批长长的影子油轮船队；2023年第四季度末接着发生红海危机，致使大批船舶绕航好望角，导致市场船舶供给出现紧张，这持续利好集装箱市场并一直发展到2024年，到目前红海危机好像还没有看到立即平息的曙光。不管黑道白道，这些年航运市场是收获满满的几年，有的在资产运作上抄了航运市场的大底，有的在市场经营中大获全胜。2024年半年过去了，在这里从几个方面梳理一下整体主要航运市场。

2024年1月至6月，全球海运贸易整体增长了2.3%，且连续18个月保持正增长，这是自2019年以来的最长的正增长周期。这反映出世界范围宏观经济趋势的改善，尤其是美国和欧洲的通胀减缓，美联储主席表示，预计未来一年通胀率不超过2.5%左右，而中国的进口仍然强劲，某些方面中国出口也持续增长，其中中国出口钢铁板材1-6月累计出口3645万吨，同比增长31.2%。

海运市场某些领域出现了分化与波动。备受关注的能源运输市场，因为俄罗斯和乌克兰战争引发的全球备受关注的能源安全背景下，能源航运市场在过去几年表现优于其他领域，当前这种势头似乎发生着变化，首先是能源贸易大宗商品的增长在2023年底和2024年初有所减缓，导致海运原油贸易增长在OPEC+减产和中国原油进口不增加的背景下受到抑制；而石油产品贸易也因全球石油需求保守而疲软。煤炭贸易的增长也从去年约7%强劲增长放缓到当前约0.3%水平。

2024年上半年，集装箱贸易以标准箱为统计为基础同比增长约5%，这主要得益于欧洲和美国经济趋势改善，且中国依然出口稳健。其它方面，粮食贸易因美国和乌克兰的出口相比2023年上半年的低迷呈现强劲反弹，而铁矿石贸易和液化石油气贸易也表现突出。海上汽车运输半年整体增长明显放缓，只有约4%的水平，去年超过17%的增长。

2024年伊始，全球海运贸易展现出积极的态势，大宗商品和集装箱贸易共同推动增长。

HiFleet shipping big data monitors maritime bulk commodities and container transport each day. Since the shipping market surge triggered by the COVID-19 pandemic in 2020, we have seen a strong recovery in the market driven by imbalances in production and trade in 2021, followed by a booming energy transport market due to the EU energy crisis resulting from the war in Ukraine in 2022. The sanctions on Russian crude oil and refined products led to significant profits, giving rise to a fleet of shadow tankers. As we approached the end of 2023's fourth quarter, the Red Sea crisis emerged, causing a large number of vessels to reroute around the Cape of Good Hope, consequently tightening vessel supply in the market. This has continued to benefit the container market and is expected to develop further into 2024, with no immediate signs of the Red Sea crisis dissipating. Regardless of legality, the shipping market has enjoyed bountiful years, with some capitalizing on the market's lows while others achieved great success in market operations. With the first half of 2024 behind us, let us take a look at the main shipping markets from various perspectives.

Between January and June 2024, global maritime trade overall grew by 2.3%, maintaining positive growth for 18 consecutive months, marking the longest period of positive growth since 2019. This reflects an improvement in global macroeconomic trends, particularly with inflation easing in the US and Europe. The Chair of the Federal Reserve has indicated that inflation is expected to remain below around 2.5% over the coming year, while China's imports remain strong, and certain export sectors in China are also experiencing continued growth, notably with cumulative steel plate exports reaching 36.45 million tonnes from January to June, an increase of 31.2% year-on-year.

However, certain sectors of the maritime market have seen divergence and fluctuation. The energy transport market, notably affected by the global energy security situation stemming from the Russia-Ukraine war, has outperformed other sectors in recent years, but this momentum appears to be shifting. Firstly, the growth in energy trade commodities has slowed towards the end of 2023 and into early 2024, which has impacted the growth of maritime crude oil trade amid OPEC+ production cuts and stagnant imports of crude oil from China. Additionally, the trade in petroleum products remains weak due to conservative global oil demand. The growth in coal trade has also slowed from a robust approximately 7% last year to the current level of around 0.3%.

In the first half of 2024, container trade, based on TEU statistics, grew by about 5% year-on-year, primarily driven by improving economic trends in Europe and the United States, alongside steady exports from China. In other areas, grain trade has shown a strong rebound as US and Ukrainian exports have contrasted sharply with the low figures of the first half of 2023, while iron ore and liquefied petroleum gas trades have also performed well. Overall, maritime car transport growth has significantly slowed, registering only around 4%, down from over 17% growth the previous year.

As 2024 began, global maritime trade revealed a positive outlook, with both bulk commodities and container trade driving growth.